

Nutshell 🥜

Does My Business Need CRM?

A helpful guide to understanding the benefits of customer relationship management software.



What is CRM?

Even if you've never used a CRM before, you've probably heard the term echoing through your industry. You know that many companies (including your competitors) are implementing CRM software because it saves time and drives sales.

But what is CRM? And what can it do for you?

CRM—or customer relationship management—is business software that helps individuals and teams maximize their customer communications and sales efforts.

CRM isn't simply an address book. It empowers your team to build relationships more effectively and provide the best customer experience from evaluation to purchase and beyond.

In the past, only the largest companies could afford CRM software, and it was complicated to learn and implement. Today, businesses of all sizes have access to easy-to-use, affordable CRM software options.

This guide explains the value that CRM can bring to your business, how to know if your business is ready for CRM, and what to consider when evaluating different CRM products.



The average return on investment for CRM is \$8.71 for every dollar spent.

source: Nucleus Research

What can CRM do for me?

When your business first started, tracking customers by email, address books and spreadsheets made sense.

But now your company is growing—and more growth means more opportunity to change how you run your business. Right now:

- Spreadsheets are hard to update, interpret, and keep in sync with your team.
- Valuable customer information hides in your employees' inboxes.
- Notes get lost or thrown away.
- Customer communication is inconsistent between your employees.

The real problem is that your most important data is spread across multiple systems and people, making it difficult to leverage your information and collaborate on sales.

This is where CRM comes into play.



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We were running on spreadsheets and that was becoming unsustainable. We needed a better solution.

— Adam K., Founder & CEO

A modern CRM helps you and your team...

1 Consolidate all your data into one easy-to-access location

CRM centralizes your customer data so that everyone at your company can access all the information they need from one platform.

Contact information

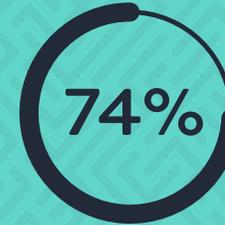
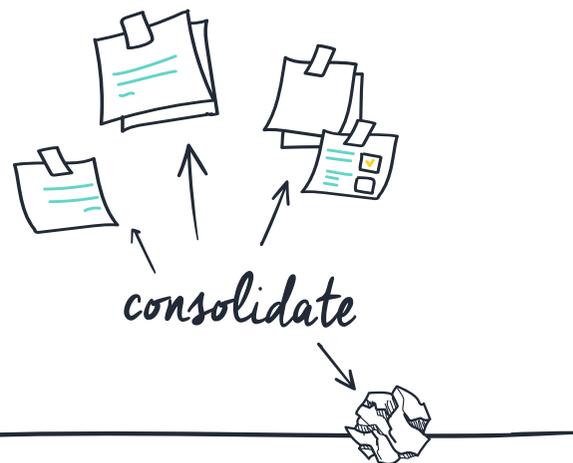
Look up customer email addresses, phone numbers, mailing addresses, websites, and social media accounts.

Communication history

Track all interactions through email, phone calls, online chats, and customer support tickets.

Customer history

Reference the length of customer relationships, purchasing history, and how customers find your business.



74% of users said their CRM system gave them improved access to customer data.

source: Software Advice

2 Sell more, faster

Having to do manual data entry is one of the biggest productivity-killers for sales reps. CRM automates many of these repetitive admin tasks so your team can spend less time typing and more time selling

CRM also helps you build a standardized sales process, which gives your team a step-by-step roadmap for closing deals and helps to reduce the length of your sales cycles.

With a sales process, you can...

Constantly improve your sales methods.

Sales processes provide the data you need to identify the root cause of stalled deals, take steps to address the problems, and ensure that your team focuses its efforts on the activities that generate the most revenue.

Accurately predict your sales

Having a more accurate sense of your win rate allows sales managers to dependably forecast how many sales their team will close from a given number of leads and set realistic revenue goals.

Get new hires up to speed quickly

A standardized sales process makes training sales reps fast, simple, and nearly foolproof, by showing salespeople what they need to do at every stage of the sale. Even rookie sellers can make an immediate impact once they learn the basic steps in your sales process.

Provide a better customer experience

When a sales rep rushes a prospect into a sales stage they're not anticipating, it can kill the deal and damage the relationship with the buyer. A sales process ensures that sellers don't advance the sale until the buyer is ready to move forward.

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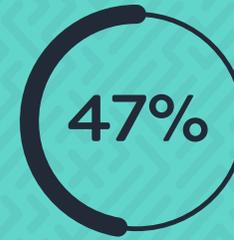
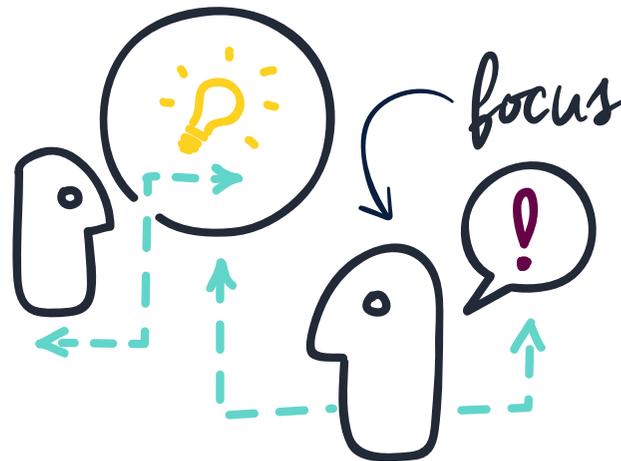
We have built an amazing sales process in Nutshell that has led to us having around a 30% close rate for all our leads.

– Matthew W., Product Manager

3 Stay focused on your customers

By having access to information on customer interest and behavior, your sales reps can pursue the right opportunities at the right time, or collaborate with your marketing team to deliver targeted and useful content to your prospects. Selling becomes a more personalized experience that's focused on the customer.

CRM data also helps you anticipate your customer's needs before they reach out to you, and your support team can keep your customers happy by solving their problems as soon as they arise.



47% of polled CRM users said that their CRM had a **“significant impact”** on customer satisfaction.

source: Capterra

Who gets value from CRM?

Any team within your organization that interacts with customers can greatly benefit from using CRM, including your *sales, marketing, support,* and *management teams.*



CRM helps sales

Sell smarter

CRM allows sales reps to manage their deals and conduct all their sales communications from one central location. By [integrating your CRM with your organization's business tools](#)—including email, calendar, and marketing automation software—your sellers don't have to waste time and effort switching back and forth between programs.

CRM software also provides full insight into the status of every deal in progress, and helps sales managers coach their team, establish quotas, and track individual sales rep performance.

Never drop the ball

With a CRM, you can automate reminders for your team to reach out to leads at the right time so that potential customers are never lost. Seeing the upcoming actions for every deal removes the guesswork and stress from a sales rep's day.

Stay in the loop

Modern cloud-based CRM platforms can be accessed from any device, which means your deals aren't all stuck in the office. With mobile CRM access and smartphone notifications, salespeople won't miss anything important, whether they're on a plane, at a client site, or walking into a meeting.

Invest in what's working, and stop what's not

Instead of guessing, a sales manager can track the reasons for why deals are won or lost. By analyzing their CRM's customer data patterns and sales reports, sales managers can determine which methods are effective and which need to be improved.



24% more sales reps achieve annual sales quota with mobile access to their CRM.

source: Aberdeen Group

CRM helps marketing

Know how prospective customers are finding you

CRM helps you track how prospects find your business—through online searches, trade shows, or specific marketing campaigns—so that you can determine where you're getting the biggest return on your marketing investment.

By having access to your company's sales interactions, your marketing team can better understand your prospects' concerns and commonly asked questions, and use this information to create more relevant content.

Keep customers engaged

CRMs capture a wealth of valuable data that your marketing team can use to nurture prospects into customers and customers into advocates.

Modern CRMs also integrate with various email and communication tools so that marketers can create effective email nurturing campaigns, keeping prospects moving steadily through the funnel.



Using a CRM can reduce a company's marketing costs by 23%.

source: Cloudswave

CRM helps customer support

Personalize the customer experience

Knowing the history of previous conversations with each customer enables your support team to deliver excellent customer service every time. By providing access to detailed customer notes and interactions, CRM lets your support team see the person behind each ticket.

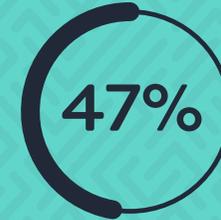
Solve customer issues faster

Faster response times to support requests means a more enjoyable and satisfying customer experience. In order for that to happen, customer data needs to be a click away.

CRM links important customer information—including products purchased, customer history, and previous interactions—to each support ticket so that you can solve your customers' issues quickly and more effectively.

Consolidate all customer communications

In addition to logging email conversations and phone calls, CRM can be integrated with online chat tools so that all support-related customer chats are saved in your CRM. Your support team can review these saved chats in the future, or send saved chat summaries to customers after completing service requests.



47% of polled CRM users said that their CRM had a significant impact on customer retention, and an equal percentage said their CRM had a significant impact on customer satisfaction.

source: Capterra

CRM helps business leaders

Measure and grow your business

Having access to data on sales opportunities, trends, and forecasts is critically important to crafting your company's immediate and long-term action plans. Business leaders can use CRM data to identify which markets and products are the most profitable, and evaluate how to adjust strategy in order to reach their goals.

Optimize team performance

CRMs keep business leaders up to date on the health of their business, and whether or not each team is on track to reaching department goals. Real-time sales reports can help company leadership identify inefficiencies in the sales process, the return on investment for marketing campaigns, and if any customers aren't receiving proper support.



**65% of businesses
adopt a CRM within
their first five years.**

source: Capterra

Am I ready for a CRM?

Companies often begin their CRM search when their sales communications start to get messy—and by then, they’ve already lost opportunities and revenue due to disorganization.

Our advice? Don’t let yourself get to that point. As soon as your business has a sales team in place, it’s time to look for a CRM.

To ensure that you’ll get the most value out of your CRM investment, ask yourself the following **three** questions before committing.

1. Do I have a sales process?

CRM is designed to complement your current sales practices. If your company doesn’t already have a standardized system for converting leads into customers, take some time to think about how your sales team generates leads and what activities your reps complete to close them. Then, outline a step-by-step sales process for your team to follow.

**Don’t have a sales process for your business?
Download our sales process worksheet!**

[DOWNLOAD NOW](#)

easy! 

2. Do I know what I want to solve?

What customer-facing problems need improvement at your company? Do you struggle with sales growth, customer retention, upselling, or customer satisfaction?

Define the issues you experience when interacting with your customers. That way, you can concentrate your efforts immediately on creating solutions after migrating your company’s systems onto the CRM.

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With Nutshell we have been able to better track our contacts, emails, and quotes, and save our employees hours of repetitive data entry!

– Clinton A., COO

3. Do I have complete buy-in?

Low user adoption is often cited as [the main reason for failed CRM initiatives](#), so getting your entire team on board is absolutely crucial. Company leadership needs to commit to transitioning business data onto the CRM, and sales reps and team leaders need to commit to using it consistently and regularly.

To achieve complete buy-in, demonstrate exactly how the CRM will bring value to each position at your company, and make sure to involve your sales team in the decision process; if your salespeople don't enjoy the way the CRM looks and feels, they're not going to use it.

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I like that every member of my team can access the same information rather than having multiple databases in internal email contact lists.

– Katie P., Marketing
Communications Specialist

How do I choose the right CRM?

For small business sales teams, some CRM benefits are nice to have and others are absolutely essential. These **eight** items should be non-negotiable when researching CRM solutions.

1. Can it track all team and customer communication?

Interactions with your customers can span email conversations, phone calls, and online chats. Your CRM should be able to capture and centralize all communications in one location so that you know the next action to take and never lose important details.

The best CRMs make it simple to enter customer data, follow customer interactions across teams, and find the information you need quickly. Pro tip: Before you choose a CRM, confirm that it can import communication history from the contact management tools you currently use (i.e., spreadsheets or a previous CRM).

2. How easy is it for your employees to use?

Sales reps aren't software experts, so your CRM should be as user-friendly as possible. Ideally, the design and interface should be intuitive enough so that everyone at your company can learn the system quickly and start using it right away.

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I didn't have any clue what “CRM” was, and many of the programs I was looking at required a business background to decode the user manual. Nutshell was intuitive. Knowing how to use my iPhone and Facebook seemed to be the only background I needed to get started!

— Bethany R., Vice President

super helpful

Download our free CRM comparison worksheet to track how Nutshell stacks up against any other solutions you're considering!

DOWNLOAD NOW

3. Can you use it on the go?

Your CRM should be accessible and provide a user-friendly experience from all devices including mobile phones, so that you can connect to your deals wherever you are.

4. How well does it adapt to your current sales process?

Implementing a CRM doesn't mean changing the way you sell. A CRM platform should easily mold to your current practices while adding time-saving automation tools and customization to help you sell more efficiently.

5. Can it import your existing customer data?

No one starts from scratch. Be sure that the CRM you're considering makes it easy to import existing customer information so you don't have to spend weeks manually typing in your current leads, prospects, and clients.

6. Does it offer custom reports and performance tracking?

Take a close look at how the CRM pulls customer data for its reports. What insights can it draw from your customer behavior, interactions, and team activity? Can the reports be exported and shared? How easy is it to customize the CRM's reporting to find the information that's most important to your team?

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The customer service has been great. Not only are they quick to respond, but it's nice to know they take their users' suggestions and implement them if they are an improvement to the product.

– Michelle M.,

Administrative Coordinator

7. Does it integrate with the tools your business uses?

Your CRM platform should allow you to manage all of your sales activities and customer data from one place. By choosing a CRM that easily integrates with your email, online chat, and document sharing programs, you'll no longer have to spend your day switching back and forth between applications and browser tabs.

8. Can I really afford this?

Per-user prices can be misleading. For many CRMs, those low monthly costs don't reflect all the hidden charges that you might be stuck with along the way.

Are there required fees for onboarding and training? Do you have to pay extra for additional contacts or reporting ability? Are there overage charges for data storage? All of these extra costs can blow up your annual CRM spend, so make sure you do your research in advance.

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A major selling point for us was Nutshell's integrations. About 70% of our communication is done through Google Mail, so as you can imagine, a seamless integration between our email and our CRM was absolutely critical.

— Steven S., VP of Marketing

What's next?

Now that you know how CRM can help your business, what to consider when evaluating CRMs, and if your business is ready for one, it's time to learn if Nutshell is a good fit.

Try Nutshell free for 14 days, or use our contact form to reach one of our CRM experts. We'll be happy to answer any questions about how Nutshell could drive the growth of your business.

*what
are you
waiting
for?*



START FREE TRIAL

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