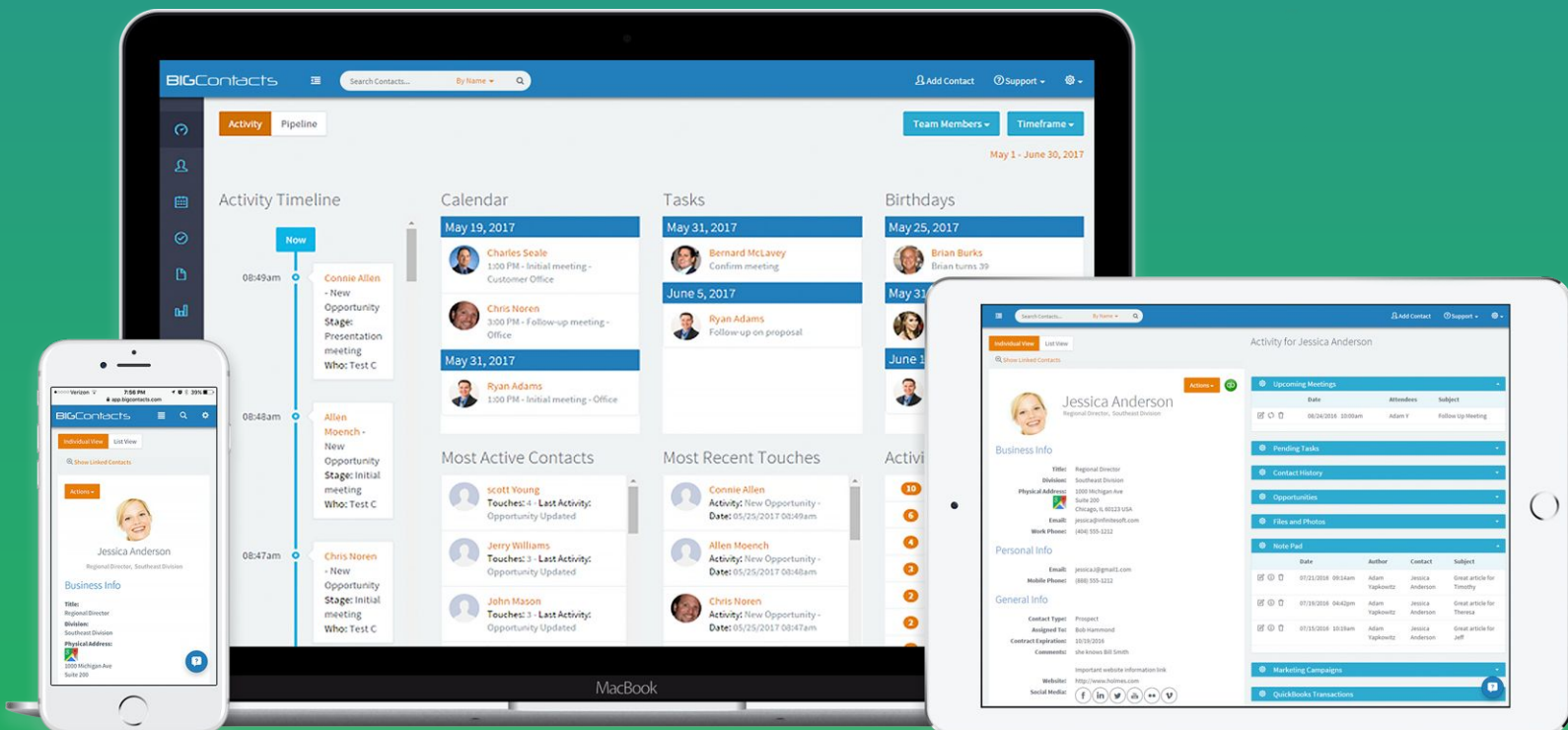


# 24 CRM

## BEST PRACTICES

### FOR SMALL BUSINESSES



# CRM Best Practices for Small Businesses

It should come as no surprise to learn that customers are a key part of any business.

Why? Because customers are your most important business asset, and it's important to look after them. That's why using a tool like a CRM essential for improving and maintaining your customer relationships.

But having this software setup isn't a guarantee for having happy customers. To get the most out of it for your business, you need to be following some CRM best practices.

Let's explore them in more detail.

# 1

## Choose a CRM with Good Support

No two businesses are the same. Neither are their CRM needs. It's important that you pick a CRM which can provide you with the support you'll need to get the most from the software.

# 2

## Consider Setup Time and Usability

If you (and/or your employees) are newcomers to using a CRM beginner, the last thing you want is an overly complex system that takes hours to setup and even longer to figure out and train everyone to use. Choose a CRM that is easy to use and has short installation/set-up time.

# 3

## Pick the Right Features

What features does the CRM software you are considering have? And are they right (and actually useful) for your small business? Always take a look what features a CRM is offering and what you need it to do before you commit. Which leads on nicely to the next point...

# 4

## Assess Your Requirements with a Needs Analysis

A needs analysis is basically how a product addresses the needs of a human. Seeing as businesses are made up of humans, you should carry out a needs analysis before buying a CRM. Lay out your requirements by thinking about the problems you are trying to solve, what processes you need to manage and how you'll measure success. This should give you a good starting point for what you need from a CRM.

# 5

## Choose a CRM that can Grow with Your Business

Instead of just choosing a CRM because it is cheap or even free, choose the software that can grow with your business, as well as help it to grow along the way.

# 6

## Read Lots of Different CRM Software Reviews

Before making any purchase it's important to do your homework and read up on some online reviews. And a CRM is no different. Research any potential choices by reading third party reviews as well as testimonials on their website. The more information you have on the different CRM options, the more informed your decision will be.



# 7

## Does it Help Your Customer Lifecycle?

It is important your CRM gives your small business everything it needs to help customers at all stages of their lifecycle. Specifically, it needs to help you with finding prospects, turning them into customers, and keeping them as long term customers.

# 8

## Consider a CRM's Customer Service

Another good CRM best practice is to look at the customer service that the platform you are considering provides. CRM software is not a one-time purchase, you'll need to have an ongoing relationship. So make sure you pick a platform that offers good customer service.

# 9

## Don't Just Choose the Big Brands

It can be tempting to just go with the big brand CRMs that you have heard of. After all, you know about them because of their reputation and credibility. Whilst this can be true, you should choose the CRM that will enhance your business the most, not just because you have heard of them.

# 10

## Does the CRM Eliminate Pain Points

It can be tempting to just go with the big brand CRMs that you have heard of. After all, you know about them because of their reputation and credibility. Whilst this can be true, you should choose the CRM that will enhance your business the most, not just because you have heard of them.

# 11

## Make Sure it Works on Mobile

With more and more people using mobile devices to get online and conduct consumer tasks, it is important to implement a CRM that can be accessed across multiple devices, including tablets and smartphones.

# 12

## Consider Things Other Than Features

When it comes to choosing the right CRM tool, it's not just about features. Take a look at other important aspects like integrations, pricing and data storage.

# 13

## Find out About Data Security and Backups

Suffering data breaches and losing data can hit small businesses hard. It's vital you consider these security implications of a CRM before you buy. Check whether it is your responsibility, or the CRM softwares for keeping on top of data security, backup and recovery.

# 14

## Check You Can Customize Communication Channels

Small businesses deal with customers that are at every stage of the buyer's journey. Therefore, it is important your CRM allows you to customize communication channels and strategies for different customers.



# 15

## Check You Can Personalize Customer Messaging

Being able to send customers personalized emails (and other communication methods) can be a game changer. Using accurate customer data you can personalise these messages to increase click-through and response rates. So make sure your CRM can provide personalization for your customers.

# 16

## Make Sure You Meet Data Policy Requirements

One CRM best practice not to overlook is making sure your data policies are compliant. Data policies and contract guarantees need to be in place with your CRM to ensure you are compliant when it comes to handling any sensitive customer information.

# 17

## Can You Easily Find Relationship-Building Insights

It is helpful if your CRM system allows you to easily find insights relevant to your customers, so you can build long lasting relationships with them and build a stable customer base.

# 18

## Check You Can Use CRM Automation

An easier way to start saving a small business time and money right off the bat is with automation. Check whether your CRM can automate things like communication with leads, so you can provide your sales team with lists of customers ready to convert.

# 19

## Keep Customer Data Up-To-Date

Up to date customer data is reliable data. Ensuring you customer data in your CRM doesn't get overlooked is a best practice to stay on top of. A CRM is only as good as the information added into it. So do yourself a favour and make sure data that is added is accurate.

# 20

## Use a CRM to Follow Up With Customers

Using a CRM does most of the hard work for you. Automating follow ups with customers is one such task. Use this to build on your customer relationships and to get back time to spend on other aspects of running a small business.

# 21

## Use Collaboration Features

Collaboration between teams is one of the best CRM features. Having the ability to collaborate should be one of the main priorities when choosing a CRM for your small business.

# 22

## Consider Customer Response Times

Response times for customer service are imperative to a good business. Getting back to your customers in a timely fashion is key to building a healthy relationship with them. That's why it is important to choose (and use effectively) a CRM that maximises this.



# 23

## Look into API Calls

If you are planning on integrating customer applications with a CRM product check to understand any limits on API calls to save yourself any headaches in the future.

# 24

## Don't Forget Your Business Goals

It's easy to get carried away with obsessing over CRM features. Don't forget they are there to enhance your business, not the other way around. Look at the broader picture and don't forget your business goals. Ask yourself: how will the CRM help achieve these goals?

# CRM Best Practices for Small Businesses

Well there you have it, 24 CRM best practices for your small business.

Do you think we missed any?

Or maybe you have experience in successfully implementing or using a CRM in your business?

If so, we'd love to hear all about it.

