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Innovations in messaging in modern CRM systems

Salesgenie CRM++ whitepaper

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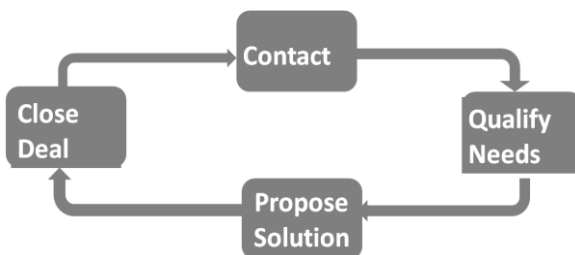
How a modern CRM system must adapt to changes in B2B sales environment

When you are selling to other businesses, big or small, what are your priorities?

As you (or your salesman) struggle to get attention from the different parts of the buyer organizations, you need to, in competition with the other players, establish your presence by increased awareness of yourself, your products-quality and prices and also build over time, a lasting relationship with as many buyers as possible.

Unfortunately the whole process of talking to customers with a view to getting their feedback about the product, communicating the virtues of your product and the desirability of doing business with you as a company is ignored leaving the salesman with too much on his plate.

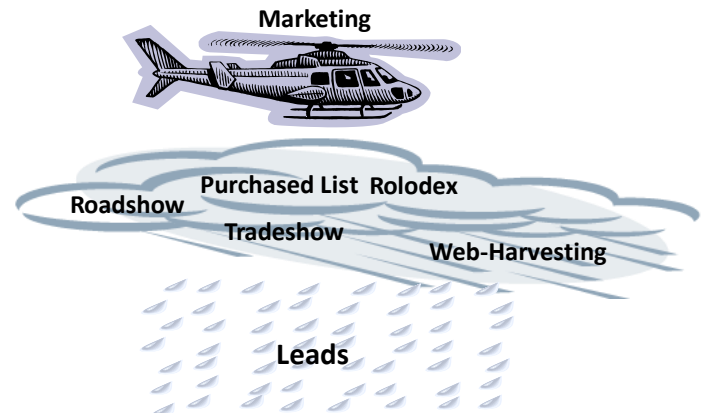
Notice that the above view does not



II. Traditional view of B2B sales process

accommodate any role for marketing. The

traditional view of marketing is one of **indirect communication**. The following diagram describes the role:



II. Traditional marketing communication

In the above view, marketing seeds the vast cloud of unknown contacts and produces leads; in the same manner as seeding clouds to produce rain. The leads are handed over to the sales department; who then “convert” them to prospects and then to sales.

This view is only “half-complete” and with the advent of the internet, can even be misleading.

For early stage contacts, those with no previous history of contact with your company, this view can hold. But, the more profitable engagements are those that happen with contacts who have been “brought inside the circle”, have been “profiled” by demographics, history of past interactions and perhaps purchase history. And, marketing can today leverage internet technology to send very precisely targeted communication to smaller and smaller sets of people.

So, Sales is today communicating earlier in the sales cycle and Marketing is communicating deeper in the sales cycle. This is key to understanding **how Salesgenie CRM++ works.**

Salesgenie CRM++ allows import and clean-up of external lists really easily

Menu driven easy interface allows easy import of external lists and cleaning up duplicates in accounts and contacts; ensures your sales and marketing executives are not spending hours but minutes cleaning up the contact list.

Salesgenie CRM++ makes communication really simple, by anyone

Salesgenie CRM++ has a strong targeting engine which allows anyone, be it sales or marketing, to select the contacts in the database who are more likely to be receptive to a sales message. What is more, you can create or import your own html email templates for use by users for customizing and sending as their own communications.

Create your own email- newsletter, email campaign, webinar or seminar invite- and mail them out. Watch the leads flow in.

Customization is key; Salesgenie CRM++ makes it possible

Salesgenie CRM++ helps map the message to the audience; as big or as small as you like. So, if a salesperson wants to run a marketing campaign to only ten people in his database, he can create (or leverage an existing template) a custom email, select the exact contacts who he knows are interested in that product or service and mail; all without needing to load anyone else. Similarly, if marketing wants to run a

campaign for a new product introduction but would not like to include those contacts that have deals at an advanced stage for an existing product, they can use the targeting tool to filter those contacts out.

Know thy customer; better, know “where” they are

When do B2B customers think of your product or service? To understand this, look at the following diagram:



These are **different stages of customer “maturity”** in terms of how advanced he is in the sales process with us; we also call these **“Islands of consciousness”** for reasons we explain below.

Remember, you can’t short-circuit the above process. A customer who is not aware of your product or solution or your company, will not suddenly put you in the shortlist of vendors she is considering purchasing from. You need to cross the hurdles of awareness generation (you exist) and interest generation (in your product’s ability to solve her problem) first. Knowing where your customer is in this process is the first step to advancing her down the process.

The goals of communication will change from one step to the other and a smart marketer will align the maximum resources at his disposal to solving the most critical issues.

We talked about the fact that customers are in various stages of awareness/ interest regarding your product/ solution or company. What tack you choose to take in your messaging to this market depends on your objective:

- Is it making sure as many potential prospects know about your products or your company?
- To ensure that you make the shortlist of vendors?
- Or, do you now want to build loyalty with the customers who have purchased your product once?
- To ensure that you are actively being compared with other products/ companies?
- Or, communicate a time-limited promotional message to ensure purchase?
- Who is the specific customer you are talking to? Are you addressing the contact that has the biggest potential impact on the sale of your product?

Did your message hit the target?

Salesgenie CRM++ logs the interaction history, purchase history, and demographics of the contacts in your database so that you can tailor your message to not only her needs but her position in the sales cycle: the particular **Island of consciousness** she inhabits at that particular time. And, it captures their

responses online, as they happen, so that you know if your messages are hitting home. If they are not, you can tweak your messages or change the targeting.

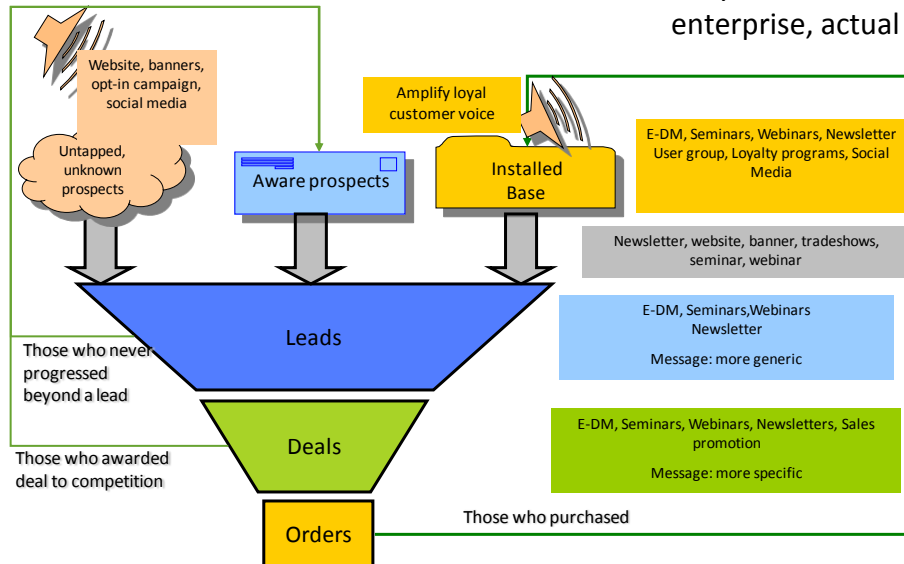
Why does it matter? Because, it pays to test the message with a small segment first before subjecting your entire database to a message that may even be counter-productive. Salesgenie CRM++ helps you **pre-test your message and audience**

Our experience says, customers, especially in a B2B setting, spend precious little time searching for a product till they have a need. The implication is that even if you spend a lot of money and creative energy getting to be known, you are pretty much wasting your time if your message reaches a customer who is not in active search mode. This is why the most expensive marketing campaigns tend to be for new customer acquisition.

Contrast this to the situation where you have a specific group of customers who have purchased your product in the last 6 months and your objective is to ensure continued satisfaction. Will your communication be different? Of course, it will be.

While the customer is in comparison mode, the opportunity is in trying to get into a close dialog and close communication. Anticipating the information needs at this stage and highlighting your advantages are critical.

Salesgenie CRM++ believes the modern customer environment with sales and marketing to be as follows:



who is involved in making purchasing decisions is key.

So, you know that even in the same enterprise, actual human beings involved in taking decisions may need to be **communicated to differently.**

Firstly, they have **unequal information and priorities** regarding you and your products that satisfy their needs. This means *some among them may be at a stage of low*

But, who is doing the actual buying?

When a business purchases goods, many people are involved in the purchase decision. And their roles and power they wield also vary from case to case.

With your young daughter in the candy store, she is the consumer (**User Buyer** in jargon), **Evaluating Buyer** (she decides which candy gets bought) and also **Economic Buyer** (the boss-man; who signs the PO). Like in an enterprise, the man who forks out the cash, often has no other authority or influence other than signing cheques.

But, when the same daughter is taken to buy clothes, we decide the budget, the colour, the type of dress, the accessories.. the lot. She virtually has no role. Knowing

awareness whereas some may be experienced users of your product for a long time. Some would have reached a stage of comparing solutions from different vendors whereas others may not even be convinced they have a problem/ need; as a result they may not even have started any active research.

Secondly, roles even within the same organization are constantly shifting. Depending upon where they are and what their role in the purchase process is, communicate appropriately and differently so that customers hear only the most appropriate product benefits.

Sounds good in theory; only the very best of salesmen manage to do this consistently and well.

Multiply the problem by the number of companies that potentially you could be

selling to. This now becomes a daunting task of reaching many messages across to many individuals across many companies. **Salesgenie CRM++** makes it possible to not only target a broad audience; it also makes it possible for us to target really small segments of buyers across many companies very cost effectively with messaging that is personalized.

Salesgenie CRM++ allows you to create multiple message templates, hundreds if you like, all geared towards different buyers, different needs and solutions. It allows all users to send these targeted messages to small sub-sets of contacts who will be receptive to those messages.

Micro-markets or, why targeting is so much fun

The same product is used by different people in the same company in many different ways. Since it satisfies many different needs by its many features, we may say that every product-application can be potentially a "micro-market" and a product's market is a sum of all the micro-markets.

Knowing all possible usages of your product is useful so that you can cultivate those micro-markets and deliver messages that resonate with them. And, aligning the message sharply to the market is the acid test of marketing.

Salesgenie CRM++ has a powerful targeting tool that helps select the contacts in your database based on their past interaction history and demographics. It thus helps you in sending the message to the right

audience. This increases customer satisfaction and sales lead generation.

About the Author:

Anindya Chatterjee, has 24 years of experience in marketing, sales and market development in India and large parts of Asia. A B.Tech from IT-BHU and a PGDM from IIM Calcutta, Anindya has substantial experience in design and deployment of marketing and sales processes and tools across geographies, leading cross functional teams and generating revenue. His last assignment was sales head for Malaysia and Thailand with Agilent Technologies. Anindya has designed, deployed, led the adoption and actively used 3 CRM systems of varying complexity in both sales and marketing leadership roles.

Anindya founded Anwasha CRM Pvt Ltd, a B2B CRM software product company, based out of New Delhi, India. Anwasha's first product Salesgenie CRM++, a Software available as Service over the internet, aims to make CRM easy, effective and affordable.