

Empower your staff to build better customer relationships



Personalise interactions with user friendly software

When investing in customer relationship management (CRM) software, it's important to choose one that's user friendly. If it's not easy-to-use, fewer of your staff will adopt the CRM system. The result: isolated departments because information isn't shared on the system, and mounting costs due to an over reliance on technical expertise.

Target three areas to ensure high user adoption

Workflow automation – Choose a system which lets you visualise and edit workflows – see what's assigned to an individual and which stage of the workflow it's at. Ensure it's easy to route tasks for approval, and to trial workflows within one team before rolling out across your organisation.

Ease of navigation – Don't underestimate how important it is for an individual's homepage to display information relevant to them. Personalise information by job role and level of seniority – ensuring users can complete their day-to-day tasks from a single location.

Remote access – Your team may need to access your CRM from anywhere, at any time. Thus, the experience must be uniform across every device. This makes it easy to retrieve and update information remotely, without learning a new system.

TOP 5 OUTCOMES FOR YOUR BUSINESS

- Improve customer service by sharing information between departments
- Save time through process automation
- Drive sales with highly motivated staff
- Reduce costs by focusing technical staff on larger projects
- Boost productivity by letting staff work on the move

"We have limited internal resources and lack IT development skills. So, we needed a solution that could be made to work well, quickly. It needed to plug-in, be flexible and the supplier had to be able to provide support to help us achieve what we wanted."

David Broadbent
Marketing Manager at Fraser Anti-Static

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