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How to take back control with CRM when events derail your business

By Mello Technologies

There's an old saying – trite, but no less true – that when life serves you up lemons, make lemonade. That's not to say, let's turn bad things (like lockdown) into sugar and sunshine because that's stupid; it means to make the best of your circumstances. But how?

If your business is affected in lockdown – like your orders or work got cancelled, you can't get stock, customers aren't allowed to buy, the market has disappeared – making lemons from lemonade is about taking constructive action now to affect the outcome either today, tomorrow, next week or once lockdown ends. Even, perhaps, for the day when the Covid pandemic is behind us.

Be there for your customers

If you weren't in constant communication with your clients before lockdown, now is the time to start (and don't stop even when lockdown ends). The one thing you can do is be there for your customers – it's an investment in them and yourself and your business.

Contact customers to see how they are doing and let them know what is happening with your business and how they can engage.

A recent email from a North Shore flexible coworking space landlord to his tenants read like this:

“X and I have wanted to reach out first and foremost to check in that you and your family are doing OK. If you or anyone in your company are struggling with mental health or business stress, please know that we are a call away.

“We also wanted to get in touch with you in regards to rent support with this current covid lockdown...”

To 'be there for your customers, you're going to have to get on top of your CRM (customer relationship management). Doing these things will give you clarity which, like lemonade, is refreshing:



Review and Evaluate Your CRM Data

Follow ups are an important part of working out any sale. Multiple follow-ups are necessary. While follow-ups can be done through tools like email, the phone is a better approach. It's more direct, allowing the agent and customer to work out details in real time.

With a personal direct approach, follow ups are more likely to succeed. Emails and other forms are too easy for a customer to ignore or miss. A phone call creates a direct interaction, plus it's more likely to foster a more amicable feeling in the customer, knowing they're talking directly to another human who cares.

Clean up past due tasks

Purge those tasks that you have never attended to because they're not a priority. Also, the ones you didn't mark complete or just plain forgot.

Close lost opportunities or deals

Review those potential opportunities you had tucked away in your long-term pipeline. The ones with an outside chance. Now is the time to take a focussed tilt at bringing them home.

Remove redundant records

Remove redundant data from your records, including unopened emails, unsubscribed users, bounced addresses, duplicate, invalid or junk data.

Update contact records

Email contacts change, new contacts are made... review all your contacts to make sure the old are updated and the new are added.

Segment your customers

Segmentation allows you to tailor your message to your audience, which improves your chances of success. Look to segment customers based on demographics, geography, behaviour, psychography and firmographics.

Create or update your email templates

To be current, you need to look current. The better your design, the greater your credibility.

Create workflows in CRM

Automate and simplify the complex processes of your business within your CRM. Consider a strategy for when these workflows are triggered or initiated manually.

Reports

Set up some valuable reports and dashboards. You can't improve what you don't measure.

Third-party integrations

Evaluate which integrations are helpful and which serve your business. Don't simply choose to enable all integrations available.



If you would like to know more or require assistance please contact [Mello](#).

Resource supplied by The Engine's provider:

