



It doesn't matter how big or small you are, whether you have a sales and marketing team of 5 or 500, few organisations would put their hand up and say they didn't need to improve their CRM results!

This Focus on CRM article will cover some of the ways you can use SAP Business One to better enable your CRM strategies.

How do you eat an elephant?

One bite at a time! One of the great things about CRM is that there are many activities and many process you can choose, focus on and get right. However, don't just start implementing processes and regimes without what you want to improve or achieve defined. Think about the following... what are the key things you need to change in your business? What are you wanting to improve? Get the team together and write down some of the key Customer Activities you do, talk about what has worked well and talk about what hasn't. "Hey what about the time we sent out those letters all addressed to Mr...., that campaign sure did backfire on us with Ms Jones." Now how can you prevent that happening again by better use of your system?

Take a vote and pick one process to start with. Agree the starting actions of what people will do... when they will enter data and ... most importantly, how will your business know you are getting the results you are after. Then put some reports in place to monitor and measure your team's progress.

If you get stuck, cant decide or want some guidance on a good place to start for your business, talk to us about facilitating a Get Going session.

GO FASTER in SAP

- Setup your own shortcuts -

Here is a simple tip to help you quickly setup some Function Keys (the ones at the top of your keyboard) to quickly open the screens you want in SAP Business One.

1. In SAP Business One, go to the *Tools Menu* at the top of the screen and choose *User Shortcuts > Customise*.
2. Choose the key you want to use (eg. F5), then find the screen using the Module and Window options. Select the one you want (eg. Business Partner Master) then click the *Allocate* button.
3. Click on the LIST TAB to see what shortcuts you have setup. Click on *Print*, then choose *Window*, to get a hard copy to stick by your monitor while you learn your shortcuts.

Give us a call on (03)358-5252 if you need a hand.

Just do it!

One of the barriers to getting CRM embedded in your business is the hesitation users face when they are not clear on what to do. Pick one part of that elephant, and give your team the time, training and feedback on their progress.

- Time - Let them get up to speed practice on a test system or even just get someone to look over their shoulder.
- Training - Talk to them about what is working and what is not. There are a heap of shortcuts and ways to get information in quickly and even using different tools like Outlook Integration for SAP Business One.
- Feedback - If you see it done right, tell them. If you see it done incorrectly, set them back on track. Get reports setup so they can see the results of their work. These can be set to be automatically delivered to them via email, daily/weekly or when appropriate.

Easily Report on Activities

- Activities Overview Report -

This report is great and has many applications, we don't see it used enough. Find it here:
Business Partners > Business Partner Reports > Activities Overview

Some Uses:

- When someone calls in sick, run the report by Handled By to see if any of their key activities need reassigning while they are absent

- I created an activity, but cannot remember who it was assigned to. Type the text into the Remarks field to search on text in Activities.

- Show me all of the 'Account Management' Type activities for the last two months...

Remember to use the filter , double click the column headers to help sort your data, or  to export to Excel.

Measure your Results

Many companies spend time entering Activities into SAP Business One without really keeping track of how this is changing their business. You need to connect your actions in SAP Business One with what you want to achieve. Are you focusing on increasing your lead conversions, getting more new customers? Or are you focused on getting repeat business with your existing customers by building tighter relationships?

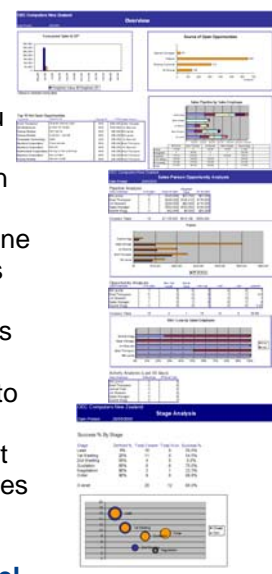
Agree on these measures, check you are recording supporting information in SAP Business One, then make sure you are reporting on this.

Best tool for this job is XL Reporter - use the power of your SAP Business One data and Excel to display your targets and progress in simple to read graphs and tables.

Summarise by Employee, Branch etc, to show how well other team members are progressing. There is nothing better than seeing that your other team members are on board and what they are achieving - a bit of peer pressure to get this going always helps.

The team at Business Evolution have put together some Best Practice report packs and guides to help businesses get started on picking the right measures for their organisation. They not only have a wealth of good measures, but a guide on how to apply relevant targets and action ideas for investigation.

These are a great starting position, so **you don't need to reinvent the wheel.**



Remember that technology will only bring you so far.

At the end of the day, customer relationships are still all about people. Building a culture that is sensitive to your customers' needs will ensure that your CRM system is put to best use.