

# CALLPRO CRM PRESENTS The Case for Call-Centric CRM Software



## Why a Call-Centric CRM? *Required Reading for Any CRM Selection Team*

Within this document we discuss the problems of existing CRM systems. How they have evolved to be used by the entire company (sales, marketing, customer service, accounting and management), but by doing so they have lost their focus on the *primary* user--sales. As such, salespeople get stuck with a CRM system that does not increase sales activity, but instead, bogs them down, decreases activity which subsequently *decreases* sales. We also address the criteria that should dominate the decision as to which CRM should be used.

This document is written for sales people, sales managers, VPs, IT, customer service and general management (CEO, CTO, CFO). It should be required reading for anyone that is part of the CRM selection team.

### ***Is There Really a Problem?***

To be straightforward, most CRM software is junk. Why? Because it does not meet the need of the *primary* user--sales. It was developed by engineers or product managers that have often never sold anything. They look at the crowded market, do their competitive matrix and then dump tons of features into the application with little thought for what a sales person values and especially how a sales person has to use it (evidence--look at many of the terrible CRM interfaces (what were they thinking?)). The result--the CRM vendors make money, but their software does little to increase sales for the company that bought it.

### ***How Did This Happen?***

CRM started as contact management software to store prospect and customer account information and to automate follow-up with reminder alerts. Popular

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applications, like the original Goldmine, ACT! and others were designed to make it easier to find contacts, setup call backs, and follow-up.

However, soon the Internet kicked in, everyone had e-mail access and sales people wanted to e-mail, send quotes, and attachments electronically to their prospects. Much of the information was found in existing accounting, inventory and fulfillment systems--and sales wanted to access it within the same database. Hence the Sales Force Automation era was born. Desktop systems were integrated with backend systems (or were supposed to be) so everything would be available to *Sales*, with the intent that *Sales* could work quicker with more automation. But the focus was still *Sales*--not everyone else.

"We even have software that touts the name, 'Salesforce!' Ouch.

Soon, *marketing* also wanted to use the sales prospect and customer database to do market research, send promotional mail, e-mail prospects and customers, track their vendors, etc. Then *support* wanted to use the same database to take care of existing customers and track issues. *Accounting* also wanted to record the account collections and *customer service* wanted to leverage the same database. It made sense--one database to manage the entire customer relationship throughout the entire company. Thus started the Customer Relationship Management (CRM) era.

Unfortunately, the decision as to which CRM system to implement was soon decided by committee (including sales, support, accounting, and general management). General Management and "armchair" Sales Managers (who didn't use the system to call) often had the most clout and were determining which system to get based on their need for reports and sales forecasting--even though they only touched the system once a week at most--sometimes never (they just got a print out). IT was deciding and influencing the CRM system based on their ability to integrate, even though they usually only touched the system initially during the setup and integration phase. And poor sales, which had to LIVE in the system every single day and call hundreds or even thousands of times each week (depending on the team size), as the *primary* user, became the stepchild and their needs (to increase sales) became secondary.



The sales team's system became the company's system and the need of Sales, which again, was the *primary* user, was neglected. Of course, with all the CRM expense, Sales was soon "forced" to use systems that were not even optimized for them anymore--and the unthinkable happened... the systems actually *slowed down Sales*, rather than increased sales. Go figure.

### So, Here We Sit

Now, we have hundreds of competitors all fighting it out to make a buck selling "Vanilla" CRM software--that is NOT optimized for the *primary* customer... Sales. This was touted in an ad from one of the early competitors, Pat Sullivan who founded ACT!, when he asked, "Why do they call it sales force software? Because you have to force your sales people to use it!!!" We even have a popular CRM software that touts the name, *Salesforce!* Ouch.

### What Do We Need?

How about we start using some common sense. How about we have software that is optimized for the *primary* customer (Sales)--they use it a LOT more than anyone else in the company and anything that increases sales more than it costs should have a positive ROI (it is harder to calculate ROI for the non-sales users). So long as it integrates ok with existing systems, is easy to record customer issues for support, can manage marketing campaigns, and management (both sales and general) can have good reports, then it pretty much meets their needs. For sales however, it HAS to increase sales. **The acid test: sales must increase!**

**"The Acid  
Test:  
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Increase!"**

### CRM Must Increase Activity

When trying to increase the effectiveness of a sales team, there are only a few variables we can control:

1. **Activity.** First is their *activity* level--specifically, their volume of calls (since most sales people still *talk* to prospects). If we double their calls--everything else being the same, sales will double--period.
2. **Skills.** Second is their *skill* level to make them more efficient (close ratios, return call ratios, demo skills, overcoming objections, prospecting efficiency, etc.).
3. **Systems & Policies.** Third, is their policies, processes, and systems--is it slowing them down or speeding them up? That's all.

Activity is increased with motivation--but also with automated call systems. Skill is improved with training--but also with scripting (CRM systems can provide branching scripts with proven dialogues that can improve skill). Of course, a good CRM system should have "call center" features (*automatically* dialing the next number, fast wrap up, etc.) that can help increase the number of calls and will increase activity automatically (without even using sales incentives!).

So, increasing *activity* should be a primary objective of a good CRM system--whether for sales, telemarketing, collections or research... more calls equals more success. Hence the ultimate requirement for a good CRM is that it increases call volume which increases success... *automatically*.



### Alternatives

So, we might ask--what are some of the alternatives to consider when trying to increase sales with our CRM? It helps to look at the central *focus* for many of the existing CRMs.

- Management/IT Centric. Some systems (like Seibel, Pivotal and others) provide great reports and integrate with everything--so management and IT often love them. But ask Sales if their interfaces help them increase sales? The typical answer is "(your expletive here) NO!" The consensus is that they are usually cumbersome, slow, often have old interfaces, require days to learn how to use and require weeks to months to get anything changed through IT.

In fact, most sales people would call these apps, "Pain Centric," because they are painful to use. If you've ever been saddled with one of these systems while trying to increase sales... it is like pulling the titanic. Plus, they usually take a long time to get implemented. Of course, the system integrator loves them (lots of "services" they can sell), but these systems seldom get high marks for increasing sales.



- Budget Centric. Other systems, like SugarCRM, may cost nothing up front to get started with, which makes these CRMs appealing. However, not only is the CRM choice too often decided by committee (management, sales, IT, marketing, customer service, etc.), but some of these CRM's are open source and so they are also *developed* by committee (and by engineers--usually with little experience using it as a sales person, or for calling).

The cost to purchase an open-source CRM is low--but the cost to setup and then use (having attempted to use with several companies) can be very expensive. One company budgeted over \$2,000 per month for six months just to customize it (and they only had three sales people)--it would have been cheaper to buy what they wanted from the beginning.

Regardless, most budget-centric CRMS are *not* optimized to increase calls since they are missing almost all of the call-centric features. Instead, most are just a massive feature dump with a sales-deadly interface. Go ahead and try one--it becomes obvious quickly that a "sales" person did not put it together--nor is Sales usually happy when they try to use it.

- Profit Centric. Popular applications like Salesforce have a TON of features--but some of the most useful and critical ones are not part of the normal package and come with a hefty price. These CRM's are robust--but would be classified as profit centric--to them (not to you). To get even basic features that are found in \$199 software such as ACT! (such as true mass e-mail to customers or prospects (more than 250 in a batch)), or the ability to do call scripting, or even territory management, we have to get the Enterprise or even the unlimited version (\$1,500 - \$3,000 per person per year!!). Even still, Salesforce is NOT designed to optimize calls. It has no auto dialer, no progressive

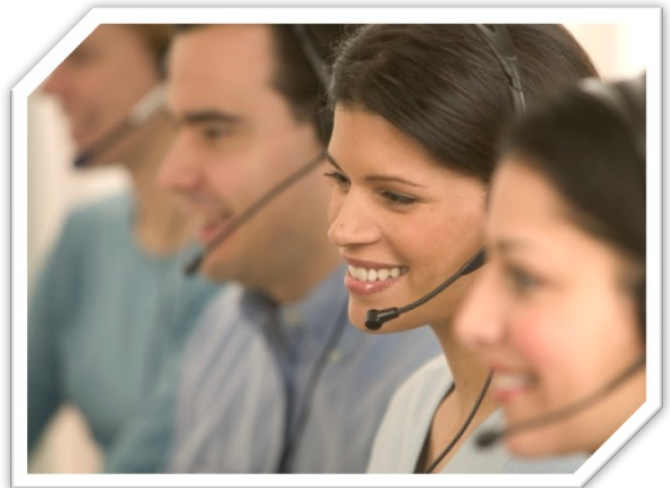
“...most sales people would call these apps, ‘Pain Centric,’



dialing, no quick wrap up, or other critical features that increase call volume—even at the highest price. It would require an add-on product to maximize sales revenue.

*“They are still not CRMs that are optimized to increase calls”*

- Contact Centric. Many of the oldest CRM systems are contact centric (Goldmine, ACT!, Maximizer) and are great when we need to look up a contact quickly and follow up. Some of these systems have scripts, and can be automated—but they were not designed as calling machines, so the rep can still cherry pick who to call (pain relieving, non-productive work—to avoid rejection) and again, they are missing critical calling features. Many of these are also not cloud-based, so we have to setup expensive replication servers (if available) to synchronize our databases if our team is working from multiple locations. The original desktop version of Goldmine was a powerful and affordable option—but it was dropped for not having VISTA or Windows 7 support.
- Lead Centric. Systems like Lead360, LeadMaster and others are good for managing and sorting leads, and some have decent CRM capabilities built-in. But few if any have interactive scripting, or territory management, and they all lack the feature set to actually increase calls (no progressive dialing with call pacing, fast wrap up, call time rotation, DNC compliance, etc.)—they are optimized for marketing, not for Sales, so by the time Sales can slowly work through the leads... many are already cold. Many of these lead centric and marketing automation systems also require a separate CRM for solid account management—often doubling their costs.
- Call Center Centric. Some systems are built from the ground-up just for calling and are used in large call centers. They often have features for both inbound, outbound and blended callers. These are highly efficient calling systems that will definitely increase call activity. However, most do not have sufficient general CRM features that are built-in (little campaign management to help generate the calling leads, poor individual account management, can't be used by other departments, etc.) so they require a SECOND expense for a companion CRM. They are usually expensive, highly specialized and have features that most small to mid-sized outbound sales and calling teams will never use such as predictive dialing (requires a larger group), call recording, call routing, etc.



Of course, to be fair, several of the CRMs cited as examples are generalized to make a point, and may also fit into several categories. Plus, they are usually better than no system at all (at least it is a database). Regardless, they are still not CRMs that are optimized to increase calls (even a spreadsheet might be quicker). Calling is one of most tedious jobs of a call/sales professional and one of the areas that, when optimized, can make the greatest difference increasing sales.



### The Solution

What we need is a *call-centric CRM*.

This is a new type of CRM that bridges the gap between Call Center Software, CRM and e-Marketing. It should first and foremost increase calls—which, all other ratios holding the same, will increase sales. It also needs to include a robust CRM (not just call center software—so it can still be used as a unifying company database), and it should have specific e-Marketing functions—since the leads from marketing must flow seamlessly into sales for prompt follow up and closure.

### What to Look For

Now that we have *hopefully* seen some of the merits of a CRM that is optimized for Sales (and actually increases activity), what should we look for? Following are some areas to consider:

#### Robust CRM

We need to start with a robust, world-class CRM. It should have the basics of contact management (ability to find contacts quickly, sort and filter individuals, companies and types, be able to manage e-mail or integrate with popular e-mail applications (Outlook, Gmail, etc.), setup follow-up calls, opportunity tracking, process sales orders and quotes, take notes and see history), plus sales management features like sales analytics and territory alignment. It also needs to have managerial reporting with customized dashboards and reports. These are just the basics and are included in most of the popular CRM applications. What is typically missing are call-centric features.

#### Call Centric

In addition to CRM functionality, we *must* have call-centric features for the professional caller (the primary user) that are optimized to increase calls, which increases contacts, appointments, demos, surveys, collections and ultimately... sales. Following are specific call-centric features to consider:

- Progressive Auto Dialer with Call Pacing. The CRM can hang up, delay for a few seconds to allow the caller to preview the contact information, then automatically dial the next number in the queue without the caller touching anything. This speeds dialing and increases total calls—often increasing calls from 70 calls up to over 240 calls or more in a day.
- Opened e-Mail Priority Dialing. The system can automatically move the hottest prospects that just opened our e-mail to the top of the dialing queue. We can now call prospects immediately after they have viewed our e-mail, which maximizes prospecting efficiency by increasing the calls to contact ratio.
- Fast Wrap. Conclude the call, setup a call-back, send an automatic e-mail and other

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automated tasks--in just a few clicks. This ensures the caller can immediately move to the next call as fast as possible.

- Custom User Views. Only show each user the screen layouts that are relevant to them for their current project, which increases user efficiency and reduces training time since they don't need to learn the entire interface and they are not distracted with non-critical information.
- Advanced Scripting. Gives users a preset list of questions which will execute according to the answers given. Helps ensure that callers are following proven and effective dialogues--"skills in a script" until the caller learns the respective concepts and skills internally.
- Call Guides. An easy quick reference to help callers make a successful call.
- Call Time Rotation. Automatically rotates the phone queue according to best geographical call times (i.e, East to West coast times (in the US)--corresponding with work hours). Makes it easier for team members to miss prospect lunch times and call prospects during their typical working hours--which maximizes prospecting efficiency.
- Do Not Call (DNC) Compliance. Compares our database against the Do Not Call Registry to ensure we do not call and violate DNC regulations. Helps us avoid up to \$11,000 penalty for each violation.
- VOIP Integration. Can dial with existing VOIP phone lines. Call Pro CRM works with the most popular telephony services, including Vonage, Skype and other popular VOIP.
- Real-Time Performance Monitoring. View agent score card, statistics and summary information in real-time. Helps individuals and managers optimize call volume, time on call, contacts, appointments, interviews, demos and sales--providing the right call feedback to manage, refine and increase sales.



These are just some of the call-centric features that dramatically increase calls. Unfortunately, most of them are completely absent from popular CRMs--which is a travesty.

### Show Me The Numbers

We talk about call-centric features, but how do these features affect the bottom line? Let's role the numbers:

Variables to Consider	Call-Centric CRM	Typical CRM
Average call time (in minutes)	1.53	2.85
Improvement	46%	0%
Number of calls/rep/day	274	147
Number of extra calls/month/rep	2,897	0
Assuming 5% close ratio (all other ratios the same)	145 sales	0

*Specific features that increased the number of calls per rep within this chart include a progressive auto dialer, call pacing, fast wrap and call time rotation. The number of contacts (versus just calls) can increase even further when we start increasing the call to contact ratio by utilizing several e-marketing features such as automatic lead and Hot Prospect Priority Dialing.*

### E-Marketing

E-mailing is a fundamental part of most sales positions. In addition, most promotions (display ads, PR, SEO, direct response--everything except trade shows (where we capture the lead at the event)) drive prospects to a website landing page--designed to generate a lead. Whether an out-bound e-mail (for prospecting or responding), or a hot in-bound lead, sales people need to be able to manage them quickly (so they can keep their rhythm and get back to the phone (aside from online "orders," few leads are closed by e-mail--they require a call). There are numerous marketing features that can be included in a CRM, but some of the e-marketing functions that can specifically increase Sales:

- Hot Prospect Priority Dialing™. First, the CRM needs to pull website leads into the CRM automatically. These hot leads can remain hot if we contact them immediately, before they have a chance to cool down. The CRM should have an option to automatically put these leads on the top of the dialing queue so we can automatically dial them within minutes. This increase the chance that the prospect is still at his/her desk and still thinking about us. It will also increase the call to contact ratio.
- Validated E-mail Delivery. We should receive notification that our e-mail has been viewed, so we can follow up.
- Instant Opened E-mail Follow-up. Better yet, e-mails that have been opened should re-prioritize the sales person's dialing queue putting prospects who just opened their e-mail on the top. This allows you to place a follow-up call as soon as possible while a prospect may still be at their desk--dramatically increase our call-to-contact (prospecting efficiency) ratio.
- Fast Wrap Automation. When we click on the Fast Wrap option to close the call, we should be able to select from several different auto responders that can e-mail a thank you, schedule a follow up call in a few days/weeks, send the demo authorization code, etc. This reduces the post call time by automating the follow up--allowing us to instantly get right back on the call--and make more calls... which can increase sales.
- Intelligent Auto-Responders. The system can send automatic emails based on a recipient's previous email response. This makes it easy to send a different follow up e-mail (such as an e-mail requesting an appointment) if the previous e-mail was or was not opened.



“...putting prospects who just opened their e-mail on the top”

### Other Variables to Consider

Other variables to consider with a call-centric CRM include:

#### Reliable and Secure

Although this is not a technical document, there are some technical features we should consider:

- Multiple failover data centers. Automatically switches to a redundant, duplicate data center. We can all read stories of cloud-based CRM's going down for the day, often because they don't have this capability.



- Isolated tenancy. Provides for greater potential security since they do not co-mingle customer data between accounts (Salesforce does NOT have this).
- Data and Field access control. Ensures individuals or groups only see data they are allowed to see. This feature allows us to combine our sales, HR and accounting database (all showing the same account) without exposing sensitive information like credit cards or HR info.

### Affordable

Price is always a consideration. We should look for the following:

- No annual contract. Some popular CRMs lock us into a year of service before we see if they meet our salespeople's needs.
- No setup or configuration fee. If it is truly a user-friendly CRM, support and training should be able to get our organization running in hours--at no additional cost.
- Concurrent users. We should look for a CRM that is licensed per account, not per user, so multiple users or shifts can access the same account. This way we only pay for users logged in.
- Free. Look for unlimited data storage, unlimited e-mails, free auto-dialing, no setup or configuration fee, plus call-centric features--all included in the price.

“Watch our number of calls, contacts and responses increase dramatically”

### Flexible - Add On

We may want to switch to a call-centric CRM, but we may already be locked into a long-term contract. Or, our organization may have standardized on a specific non-call-centric CRM, and you are a small division without enough clout to change the corporate standard (even if our calling needs are different)--so we can't switch entirely. In these cases, we should consider a CRM that can act as a standalone or an add-on (where our data transfers between the two systems). This will allow us to remain in compliance, or leverage any existing investment, while also benefiting from call-centric features. It won't take long before the increased calls and increased sales will prove the benefit of switching (or at least retaining the add-on). Plus, the additional add-on cost will only be for Sales--not the entire company.

### Picture This

Imagine one of our sales people sitting down to a call-centric CRM system, pressing one key to get started and having the system automatically start calling--either the next number in the queue or the most recent website leads, or number that opened an e-mail. With automatic and progressive dialing, the system keeps us moving, and the intelligent and automatic selection tied to our e-mail campaigns maximizes the chance we will catch a live prospect. We can watch our number of calls, contacts and responses increase dramatically as our "pain relieving, non-productive work" decreases--resulting in more success, whether it be more surveys, collections or sales.



**Finally Sales is taken care of... and when Sales is up--the company is up. Life is good!**



### What Next?

Thank you for taking the time to discover the advantages of call-centric CRM.

This document was sponsored by Call Pro CRM, the #1 e-Marketing and Call Centric CRM. If you call for a living... get Call Pro CRM.

Following are additional resources to help you learn more:

- **Website:** You can find out more at [www.CallProCRM.com](http://www.CallProCRM.com)
- **Video:** Watch one of the CallPro CRM videos to see how it can increase sales.
- **Webinar:** Sign up for one of the regular webinars to see CallPro CRM in action
- **PowerPoint:** You can also request the CallPro CRM PowerPoint which explains how CallPro CRM can help your organization.



### About the Author

Ted Finch has managed numerous small sales teams, two teams of over 300 people each, one with over 4,000 sales people, and has trained thousands of sales people. He was the first VP of Marketing for Goldmine (the most award winning CRM at the time), launched Netscape, was a VP for Harcourt, Sr. VP for Motorola, a VP for GE, and has helped launch over 400 products, and consulted with over 200 companies (including Microsoft, Adobe, HP, IBM, Citrix, Autodesk, Sony, Disney, Boeing, Intel, Word Perfect, Iomega, Apple, AMF, Ashton Tate, Novell, Creative Labs, Ingram Micro, AOL, Lotus, Corel and more).



He has grown up within the evolution of the CRM era, and is an advocate for sales people everywhere who are frustrated with non call-centric CRMs that slow them down--but still have quotas, companies and families to feed.

This document represents his *opinion*--based on experience with over 15 of the most popular CRMs (he has evaluated *many* more) within small start-ups to some of the world's largest enterprises where he has seen what *has* and *has not* worked...to increase sales.