# THE CRM SOFTWARE - A POWERFUL INSTRUMENT FROM THE DIGITAL SOCIETY

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## ABSTRACT

*Customer Relationship Management has become a decisive factor for a successful business. For large companies it is a great challenge to promote a local mentality in all departments and at the level of all employees. A CRM program has several components and it can be implemented on several types of company-specific activities. A CRM module can include a number of sub-modules or features. The article discusses both the main issues faced by sales managers and the major CRM software available on the market. In the paper it is presented the 360BussinessSoft.*

**KEYWORDS:** *CRM, marketing, customer relationship, 360BussinessSoft, management*

## 1. GENERAL INFORMATION ABOUT THE CUSTOMER RELATIONSHIP MANAGEMENT CONCEPT

Nothing is more uncomfortable for a salesperson than not doing a business because the necessary information was not available. The main questions of any businessman, and especially a sales manager about the work being done, are: What has the customer already acquired? How profitable is the customer? Can we deliver the amount requested by the customer in a timely manner?

On the other hand, nothing is more uncomfortable for a client than having to work with a company that is not able to meet its needs in a timely manner. Only customers who have been fully satisfied will return in the near future.

Customer Relationship Management has become a decisive factor for the success of each business. For big companies is a huge challenge to have the same local mentality in all departments and at the all employees.

Customer Relationship Management is the concept of making the client the primary target of a company and its business processes. It has to be implemented as a basic philosophy of the company, and all the strategies promoted by it must be in line with the long-term strategic objectives of the company's management. The purpose of all the activities of a large company is to place customers at the forefront, rather than seeing them as a means of achieving the desired goal, especially increasing turnover.

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CRM can be seen as an extension of the concept of selling to a continuous process, equally considered art and science, collecting and using customer information to "educate" loyalty - which is impossible to achieve without using the appropriate technology.

Last but not least, a CRM approach is a process of guiding the entire business to its exterior, customers, involving customer understanding and process management within the company to develop and maintain customer service.
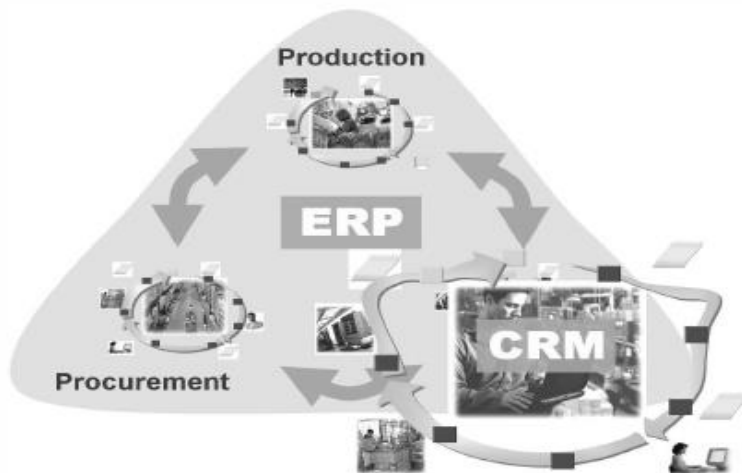


Figure 1.

The principles of customer relationship management must be the main purpose at all levels of the company. Customer Relationship Management intends to create and build long-term relationships with all customers in all phases of the business relationship.

From the point of view of business management, there are four stages of customer relations: the potential customer, win the customer, ensuring the service by the company and keeping the customer.

The first step is identification the potential customers. This is the first contact between the company and the client and it assumes that a customer is interested about the company and its products.

The second stage from the point of view of customer relationship management is winning the customer. This implies that the client has a clear intention to purchase and the company receives an order.

The third stage consists of insurance service for the product or service sold to the customer. This is the fact that the company ensures the customer's full satisfaction of the purchased product or service.

The last step, and the most important, is keeping the customer. Through specific and attentive service, the company ensures that the customer will be both satisfied and loyal. The customer will remain faithful to the company even if a competitor offers a similar product at a similar price.

Figure 2.

The most common problems that a client can meet, which does not refer to the quality of the products offered by the company and strictly to its relationship with the organization from which it purchases the product or service, are:

1. To be contacted by more than one employee to ask for the same information.

By not having an efficient method of storing and disseminating information, two employees of a company can contact the same potential customer to make their offer available. Even if after the first call the client could have been interested about the product or service, the fact that he was disturbed once again for the same information and, implicitly, noticing the lack of organization of the bidding company, can make him quit.

2. The client should be required to provide the same details whenever contacting the company

If they have been collaborating for some time with a particular company, customers may be bothered if they need to give the same details (delivery address, phone number, bank account and the others) every time they want to buy something or ask for certain information.

3. Disturbing the client at inappropriate hourly intervals

Nobody likes to receive phone bids from different companies while being at work or at other inappropriate times. Therefore, some clients will explicitly request that they be contacted at certain days or time intervals. However, even if that information was communicated to an employee who later leaves the company, those who will replace it will not know all of these details.

4. Customer is not contacted when the company promised or expressly requested.

In case of a customer requests the delay of the telephone call, he will also mention the exact moment at which he will want to be reconnected. Failure to comply with this request will suggest a lack of seriousness from the company and will be tempted to give up collaboration.

5. Customer receives offers that are not in accordance with its requirements

Depending on the preferences and exigencies of each customer, sales consultants will send them personalized offers to ensure that the sale will take place. During the conversation, the client will expose his / her needs and, depending on them, he / she will expect an appropriate offer. If the details of the offer are not the desired, the customer will refuse it and go to another supplier. This situation occurs most often in the context in which the seller writes briefly on an agenda such information, and at the time of the offer he does not find them anymore.

6. Do not take into account all customer requirements

Registering information on paper, in different agendas, or even transmitting live messages may lead to their distortion. Loss of sight of certain client needs is a major mistake that often leads to their loss.

7. Do not meet the delivery times promised to the customer

Lack of organization within the company can lead to overtaking terms promised to customers, very few of them being those who will accept an overdue delivery deadline or a wrong order.

## 2. THE MAIN FEATURES OF A CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE

The Customer Relationship Management software can be seen as an "overall" approach that integrates order picking, sales and service processes, which unifies and coordinates all channels through which the customer interacts with the company. It is that "something" that has the most to do with customer satisfaction and, in fact, has nothing in common with technology and for which technology is just a means and not an end in itself.

A CRM solution covers four business components:

- Front-Office: operations in this category refer to the direct customer interactions, such as: sales meetings, presentations, phones, emails, online services, etc.
- Back-Office: represents the processes which have implicit effects on front-office activities such as: marketing, market prospecting and service.
- Business Relationship Management with other companies: partners, suppliers, vendors, retailers, influencers, opinion leaders, press. This component includes both front-office and back-office activities.
- Centralized data analysis is the operation performed with the goal of developing marketing campaigns, sales strategies and intuitive workflows.

A CRM system can cover several types of business-specific activities, such as:

- Sales
- Managing potential customers and contacts
- Opportunity management
- Managing accounts (clients)
- Analysis and sales forecasts
- Marketing

A CRM module may include a number of sub-modules or features, such as:

- Day-to-day management modules (phone calls, meetings, e-mail [import-export from MS Outlook] and general activities)
- Easy task coordination using personal calendars and group calendars
- The ability to generate large-scale activities from the browsers of other connected modules
- Activity links, automatic creation of new activities by other activities, activity history
- Record transactions from all major connected modules
- Analysis of Business Intelligence activities
- E-mail management and connection to Outlook
- Extensive management of sales opportunities
- Managing the probability of closing
- Monitor the activities of sales agents
- Direct information report

Turning to the most common issues which a client can meet in relation to the company where he purchases the product or service and for which a CRM system provides solutions are:

1. To be contacted by more than one employee to ask for the same information.

With the help of the CRM software, the contacts entered into the system once, and all employees who have access to it can view or add activities such as phone calls, emails, or other relevant details. Information from a CRM system are visible to all users, therefore it will not be necessary another call to that client if the assignments of another employee are handed over.

2. The client should be required to provide the same details whenever contacting the company

Keeping each detail within the CRM software and easily accessing them by any employee can significantly reduce the duration of a call with a customer. By simply searching by name for a contact in the CRM system, you can view the entire history associated with that contact: contact details, purchases made, sent offers, favorite products and others.

3. Disturbing the client at inappropriate hourly intervals

In a CRM system, this information can be completed, as well as other details related to the relationship with that customer. Thus, the company will be able to adapt to customer requirements, gaining confidence, and the customer will want to work with a partner who knows their needs.

4. Customer is not contacted when the company promised or expressly requested.

The CRM software allows you to set certain alerts such as appointments or phone calls, allowing the employee notifying about contacting him at the time agreed with the client. With the help of a CRM, other users can have assigned certain tasks if the person who has hired to contact a customer is busy with other activities.

5. Customer receives offers that are not in accordance with its requirements

The bidding system within the CRM software allows the user to register an unlimited number of offers and attach them to each client account in order to have a relevant history of the requirements expressed. Customer receives the offer associated with the account or, according to the specified data, will accept or request additional details.

6. Do not take into account all customer requirements

The CRM system keep updated periodically the details about customer requirements by those who interact with them. In that way it is avoided the situations where important customer data are missing.

7. Do not meet the delivery times promised to the customer

The CRM software organizes the entire activity keeping within the same system all the information about interaction with each client, based on complete and accurate information. In this way, the sales activity is much better organized and the deadlines set respected.

The advantages of using a CRM program from the point of view of the company are:

- Helps increase sales by optimizing four main factors: increasing the number of sales opportunities, conversion rate of opportunities in contracts, average value of a contract, and lowering the average sales life cycle

- Contributes to improving the quality of the sales process by permanently monitoring sales, setting up personalized streams, implementing company-level best practices, or setting performance targets

- Automates your online marketing and email marketing activities, turning site visits into sales opportunities. It also facilitates the implementation of integrated marketing campaigns.

- Increases customer relationship quality by giving employees access to complete information about each. This information helps employees resolve customer requests as quickly as possible.

- Increases employee productivity by providing automated workflows, responses to frequently asked questions, or company-wide good practices, all within the same system.

- Contributes to the successful realization of the projects carried out in the company, giving visibility to all the activities that they make. In addition, it allows the simultaneous management of several projects and the appropriate allocation of resources for each of them.

## 3. THE MAIN CRM SOLUTIONS AVAILABLE

In the last decade, CRM products have been a very strong market, which has attracted a lot of companies, making them create their own CRM solutions. These were either "pennant" solutions of small companies specialized in such services, or solutions

belonging to specialized divisions of major IT solutions such as SAP, Oracle, Microsoft and others.

These CRM solutions include:

a. The Microsoft Dynamics CRM

Microsoft Dynamics CRM is a CRM solution that provides the tools and capabilities needed to easily create and maintain a clear picture of customers, from first contact with them to post-sale purchases and services. With sales, marketing, and customer service modules, Microsoft Dynamics CRM proposes a fast, flexible and affordable solution that delivers consistent and measurable improvements across all business processes, facilitating closer customer relationships and reaching new levels of profitability.

Even for companies with highly complex sales processes, Microsoft Dynamics CRM offers easy-to-use features and capabilities that help improve sales and marketing departments to address new customers, manage marketing campaigns and determine sales activities.

b. Siebel

Siebel Systems was acquired by Oracle in 2005 and is the leader of solutions vendors that help organizations of all sizes to optimize their workforce, processes and technology available around their customers, leading to excellent customer relationship and performance business superiority. Solutions provided by Siebel are the result of 11 years of experience with more than 4,000 organizations.

c. The Chordiant CRM

The Chordiant Software, Inc. offers software applications to companies that offer consumer goods and services around the world. Organizations that work in areas such as banking, banking, financial services, insurance, or telecoms rely on Chordiant to help develop excellent customer relationship capabilities, generating increased loyalty and profitability.

d. The SAP CRM

The world's largest enterprise solutions provider and third-largest software solution vendor, SAP, offers CRM turnkey solutions that are easy to use on the web-based, subscription-based platform.

Used by more than 3200 clients worldwide, the mySAP CRM includes features to support key business processes such as marketing, sales, services, e-commerce, or customer contact management.

There are a lot of CRM programs, like: Act!CRM, Adempiere, Base CRM, bpm`online CRM, CiviCRM, Contactually, Dolibarr, Epesi CRM, GNU Enterprise, Group-Office, HubSpot CRM Free, Neolane, Nutshell CRM, Pega CRM, Pipedrive, Pivotal CRM, Really Simple Systems, SageCRM, Salesbox CRM, Salesforce.com, Streak, SugarCRM, SuiteCRM, SuperOffice CRM, TeamLab, TeamWox, Tryton, Zoho CRM and others.

## 4. 360BUSSINESSSOFT - A USEFUL AND INTUITIVE CRM SOFTWARE FOR A SALE TEAM

The purpose of marketing and sales activities is to create, maintain and develop the customer relationships. The main objective is to make customers climb on the relationship scale.
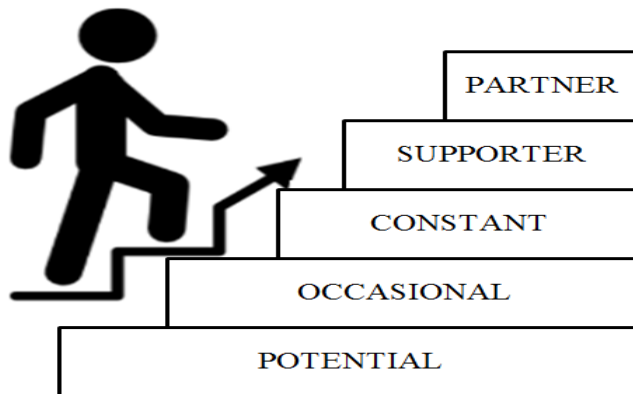
Figure 3.

The relationship scale is composed by all stages that a client can be for a company, from a potential to a partner one. The potential customer has not yet bought the company's product but is interested in it. The occasional customer bought at least once the product or products of the company. The constant customer repeatedly consumes the company's products. The supporter customer consumes the company's products but also recommends them to their acquaintances or others. The partner client actively contributes to the company's development.

The 360BussinessSoft program organizes the sales process on several stages, namely: The Prospecting, The Approach, The Bidding and The Order. The sale process is like a triangle with the tip down, each stage of this process having a well-established place and role.
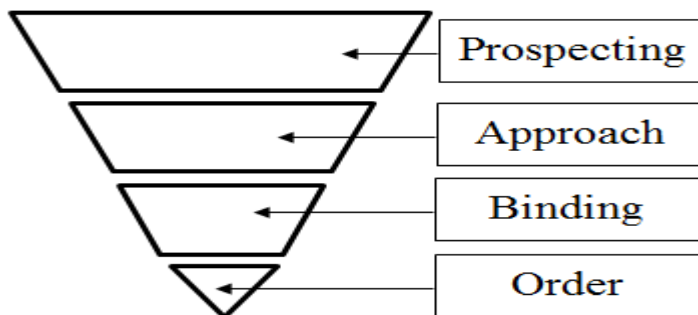
Figure 4.

In the prospecting phase there are identified the customers interested in the company's products or services. The approaching phase consists in addressing customers and

identifying their particular needs. Further, it follows the bidding phase. The offer must be made in accordance with their needs. The command phase consists of executing the transaction and planning the next sale.

The 360BusinessSoft application has six modules: Dashboard, Accounts, Sales, Financial, Support, Campaigns.

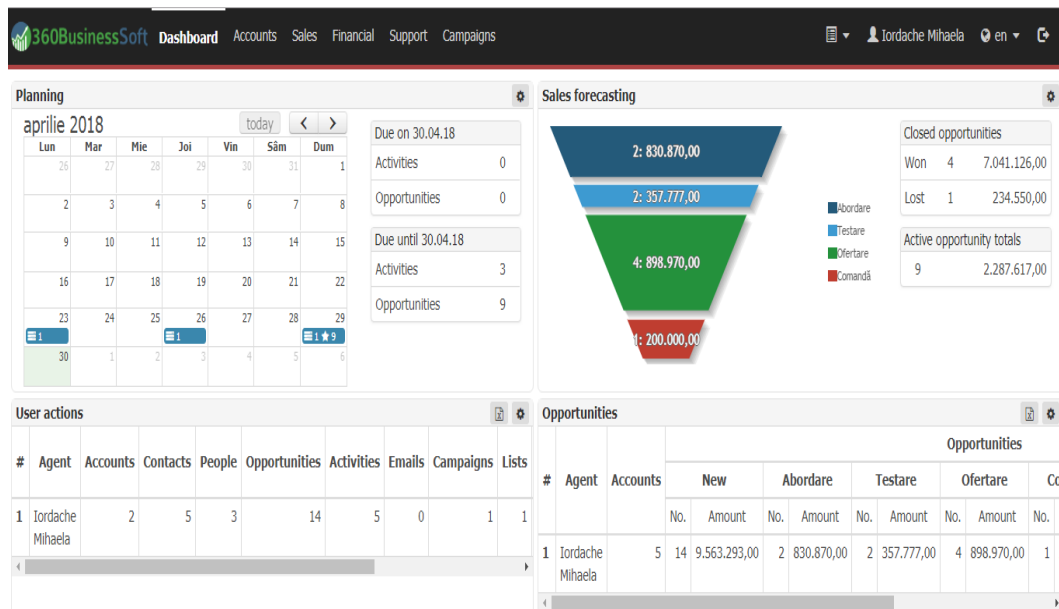The Dashboard provides an overview of activities across the organization.



Figure 5.

The dashboard allows the user to set the displayed panels. It can show the position of each panel on the screen. Thus, the following panels can be displayed: Planning panel (it allows viewing of activities on the current month), the sales estimation panel who displays sales opportunities grouped by stages, the user actions shows the number of entities added by users, usually in a month, the opportunities which displays sales opportunities grouped on users and stages, portfolio of activities shows the details about support activities grouped on users, the balance, the budget (displays balance of accounts revenue and expense in real time), the sales report which indicates the first sales made for the first five products or services of the company and the others.

The Accounts module allows the user to manage all accounts and people with whom the company interacts.
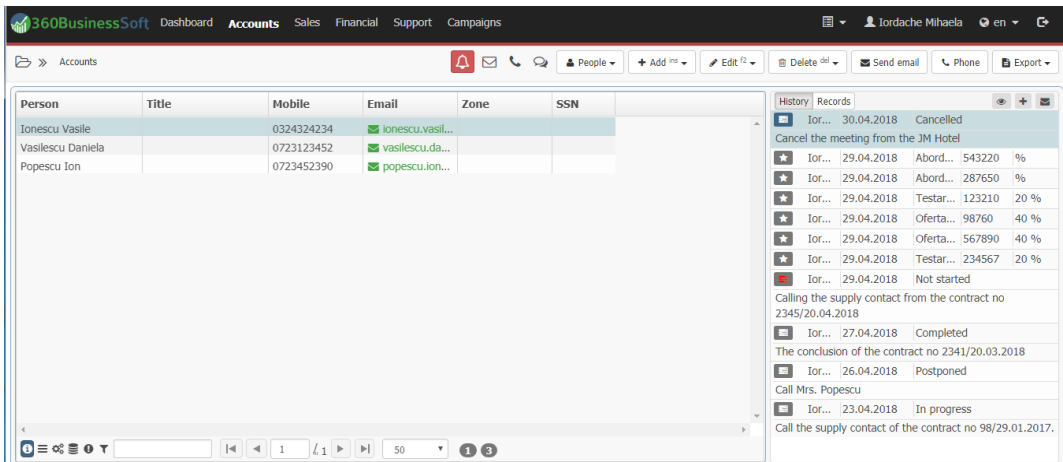
Figure 6.

In this module the user has the possibility to enter data about new accounts, but also about clients with whom the agencies relate. Other actions allowed here are: searching and filtering accounts, identifying duplicate items and unifying them, importing accounts from other files, dialing by phone, and / or sending sms to clients or agents. Also in this module the user can add opportunities, invoices and other activities for each contact. It also can be created the templates of offers and send them by email to each contact (customer), and others.

The Sales module allows the user to view sales made over time, but also the status of other transactions. All data can be filtered according to several criteria: depending on the agent, the status of the transaction, and the priority of the transaction.
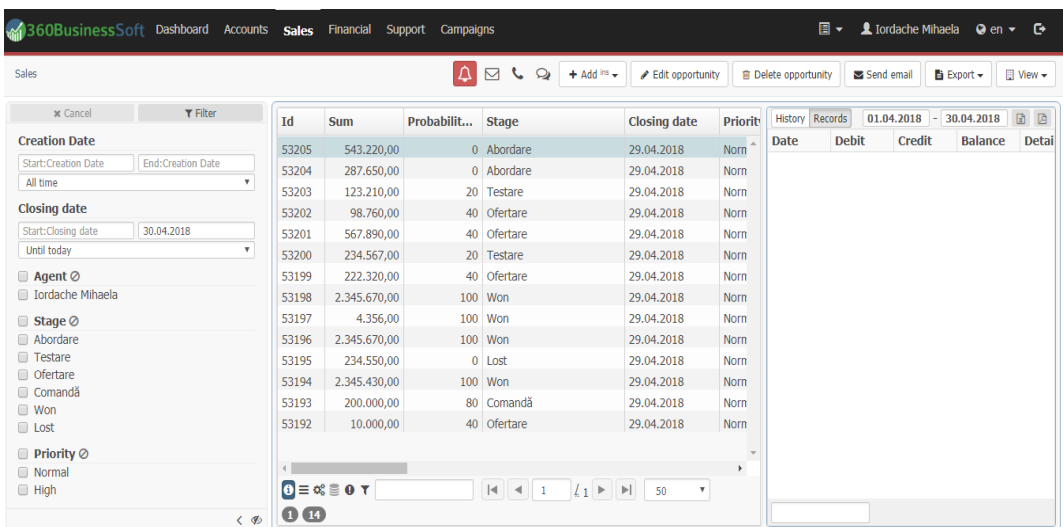


Figure 7.

The financial module allows the user to perform financial transactions with customers, invoice the products, record revenue and earnings both in the customer account and in the income account and the available account too.
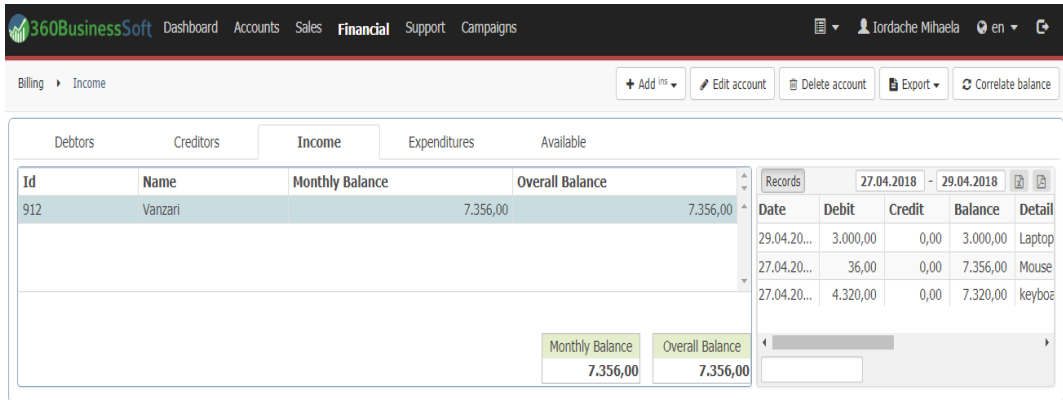


Figure 8.

The Support module assures the sales person that the customer's expectations regarding the product or service sold are fulfilled. This can be done through a telephone, email, visit planned and executed after the transaction.
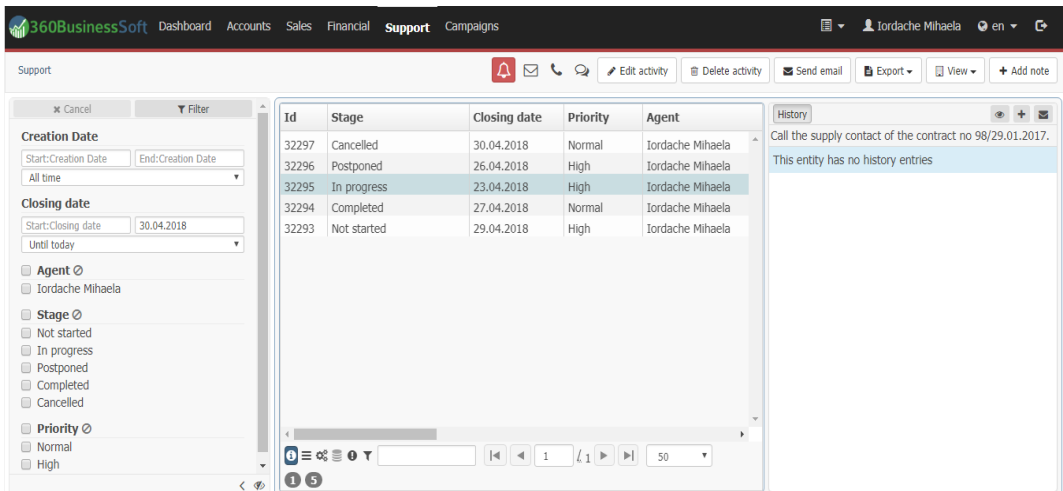


Figure 9.

Also within this module the tasks can be classified according to the agent who performs them, the level of priority, stage they are in. Furthermore, they can be viewed according to a user-specified time interval.

The Campaigns module allows the sales agent to communicate with customers via email. Thus, customers can be informed about the company's products or services, company events, promotions, and loyalty campaigns organized by the company.

Within this module, the salesperson can add new email lists, add campaigns, create email templates, send email to clients, and at the end of the campaign, the program 360BussinessSoft makes a report.
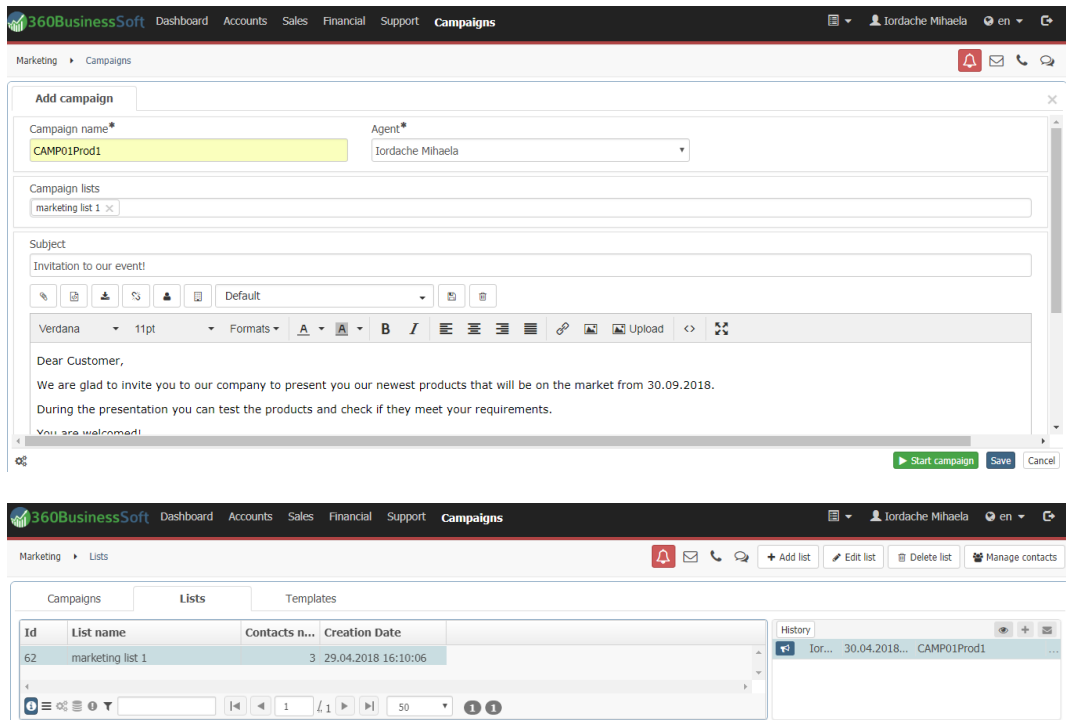


Figure 10.

## 5. CONCLUSION

Customer relationship management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth. The CRM systems compile data from a range of different communication channels, including a company's website, telephone, email, live chat, marketing materials, and more recently and social media.

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