



CRM for MANUFACTURING

Manufacturing is undergoing a transformation that some refer to as fourth industrial revolution (or 4IR). Manufacturers say 4IR is about gaining insights to help improve productivity, deliver greater value to customers and remain competitive.



The transformation starts with optimising existing business processes, but ultimately ambitions will be rooted in winning new business - increasing sales and growing market share.

As consumers demand personalised customer experiences and services, this is driving a shift away from production-centric thinking to a strategy that is more customer-centric, and only the companies that can adapt will continue to thrive.

This customer knowledge typically exists within a manufacturer's sales, marketing and service teams, but until it is captured and shared with production teams, it is difficult to provide customers with the personal experience they expect.

While cost savings are important, a growing number of mid-size manufacturers are turning to cloud-based CRM (Customer Relationship Management) technology to increase customer lifetime value through more effective sales, marketing and services, greater operational efficiency, and improved collaboration throughout the business.

SO WHAT ARE THE BENEFITS OF CRM AND WORKBOOKS IN PARTICULAR, AND HOW CAN IT HELP MANUFACTURING BUSINESSES?



SALES & MARKETING

Efficiency



CUSTOMERS AND CHANNELS INSIGHTS

There are only two ways of growing your revenues: find more customers or sell more to existing customers.

In order to be successful, sales team need easy access to information, deep customer insights and the tools to close deals quickly and efficiently. They need real-time data to drive quick decision-making.

Imagine having a single 360-degree view of your target market and the key segments; what they want, when and how they want it? Imagine having a complete view of customers, across all your distribution channel, to improve cross-sell and upsell while generating more leads? With such valuable insight you can develop an accurate strategy for your business.

With Workbooks CRM you can manage your distribution channels more effectively, whether you are selling your products direct, via resellers and distributors or online. You can analyse your sales performance by country, channel, sales rep, product line etc. You can quickly identify how channels are performing and take appropriate actions.

You can track and monitor your company's activity, interaction and communication with your customers, and shorten sales cycles through effective management and assessment of leads and opportunities in your sales pipeline. You can track conversion rates through the sales cycle and forecast accurately, and thanks to a mobile app, you can access the right information anywhere, anytime.



EFFECTIVE ACCOUNT MANAGEMENT

With Workbooks CRM, it is easy to identify cross-sell and up-sell opportunities.

You can easily segment clients by the products they currently buy, identify clients who have stopped buying or are buying less than they used to, and understand your share of wallet with each of your customers. You can easily create a RAG (Red Amber Green) process to quickly identify the health of a particular customer. These insights can improve your account management strategy, drive better decision making and identify where to focus your marketing and sales resources. It can also influence your production schedule and your product development strategy.



MARKETING ROI

You can market and sell smarter, and focus on the right opportunities at the right time to drive revenue growth.

Your Marketing team can leverage Workbooks' Marketing Automation suite to complement the activities of your Sales team. They can use Workbooks GatorMail to send personalised emails to connect with prospects and customers throughout all stages of the sales cycle. You can easily market to existing customers based on purchase history and to identify new revenue opportunities.

Marketing can easily view response rates to quickly identify successful tactics and determine ROI on marketing campaigns. You can track KPIs, email open and click-through rates, the status of leads and sales opportunities associated with a particular campaign.

Workbooks' Web Insights tool allows you to gain valuable insight by tracking and scoring website visits, so you can easily allocate leads to the right team or channel and encourage the Sales team to respond accordingly.





FULL LEAD TO CASH PROCESS

With embedded Configure-Price-Quote (CPQ) functionality, your sales teams can quickly determine the right solution for customers.

They can easily produce quotes and then process and track the status of orders, invoices and payments – all from within CRM - giving them a view of the entire 'lead-to-cash' process.

Workbooks CRM gives you the tools to do business more efficiently and engage with your customers and channels more deeply. You can dramatically increase the productivity of your sales, marketing and service teams by making sure they have access to the right tools wherever they are. You can market and sell smarter, and focus on the right opportunities at the right time to drive revenue growth.



"Forecasting has been a massive change for us. A sales manager or a salesperson can look at their forecasts in real time and say, 'These are my projects – which are most important right now?', which has made a huge difference."

Rob O'Connel
SALES AND MARKETING DIRECTOR
RUSSELL FINEX



INTEGRATING ERP AND CRM *to Enable Collaboration*



Deliver greater value to customers, improve productivity and remain competitive.

Linking systems together allows a flow of data that can be turned into information and insights and acted upon quickly.

Enterprise Resource Planning (ERP) systems do a great job of managing the order-to-invoice process, including manufacturing, bill of materials, stock control, invoicing and accounting, but ERP systems are often poor at supporting the sales and marketing processes within a business, so a best-of-breed approach is often the most successful.

Being able to market to your clients effectively requires you to have transaction data in your ERP and CRM systems, and integration allows you to exploit your existing customer knowledge to full effect. Profiling your existing customers by industry, purchase history and historic revenues, allows your sales and marketing teams to target existing clients for upselling and cross-selling opportunities more effectively. It becomes easy to promote new products to your customers if your marketing team can identify all the clients that bought previous products.

An automated exchange of data between CRM and ERP systems provides a bridge between sales, marketing, customer service and production, encouraging greater collaboration across the organisation. This two-way stream of information provides production teams with pipeline visibility so they can plan production schedules accurately, and sales teams can review stock availability, product warranties and maintenance contracts. And by having access to stock control and production information, sales reps can better manage their sales pipeline, and manage customer and channel expectations.

And let's not forget the benefits of avoiding time wasted on error-prone rekeying of data between systems.



SERVICE AS A *Differentiator*

Customers are at the core of every business and keeping them happy is one of the greatest challenges that organisations strive to achieve.

Manufacturing organisations understand the importance of their service departments to their businesses, but many mid-market manufacturers are still using spreadsheets or paper-based systems to track customer information, including purchase history and service requests.

Many manufacturers still have engineers printing out service tickets to take on customer visits, and need to adapt their service models to keep up with customers' needs and expectations. CRM helps you to achieve service excellence by automating support processes, offering self-service capabilities, efficiently managing maintenance schedules and warranties, and supporting field services agents.

Manufacturers are increasingly using self-service capabilities to address the needs of their customers. Providing online help videos, FAQs and a knowledge base can significantly reduce the quantity service enquiries.

The Customer Service Portal enabled by Workbooks CRM allows your customers to raise a new support ticket, view existing tickets, share knowledge with other users etc. – all managed and monitored by your service agents. The Portal provided by Workbooks can reduce the number of customer cases being raised and substantially improve customer satisfaction.

With Workbooks CRM you can provide smart, personalised service with instant access to critical maintenance, warranty and contract information from one central location. With omni-channel support, service agents can engage customers in real-time using their preferred communication method.

You can easily schedule preventive maintenance, manage warranties and renewals, push service notifications to customers, manage RMAs (return merchandise authorisation), spares fulfilment and much more. All interactions and touch points are recorded, escalations and alerts kick-in at the right time, and your customers are never left unattended.

Further integration with geolocation tools such as GEOPAL, for example, allows you to manage your engineers and field operations team, by arranging schedules, planning routes and providing parts to ensure a successful resolution.

And finally, your service agents can use mobile devices to access all the information they need from the customer's site.



CONCLUSION

Whether or not you agree with the term '4th Industrial Revolution', technologies such as Workbooks CRM are creating opportunities for manufacturers to use their information assets to revolutionise business performance.

The majority of manufacturers recognise the need to invest in new technology to improve customer intelligence but the key objective for most is increasing sales and growing market share, and CRM is the enabler of these ambitions.

Workbooks CRM can help improve the effectiveness of your sales, marketing and customer service teams, and when data is shared with your ERP system, all parts of your business can contribute to the improvement process.

You can streamline operations and drive efficiency throughout the entire lead-to-cash process. Delivering customer service excellence.

WORKBOOKS CRM

- 360 degree view of advertisers and subscribers to service them efficiently and effectively
- Management complexity of eco-system: clients, suppliers, partners
- Access to information anytime, anywhere (mobile app)
- Sales and Marketing management
- Automation and Workflows
- Report and analysis for better decision making
- Marketing Automation
- Event management
- Sales order processing / invoicing