

A Buyer's Guide to CRM Functionality

By Clare Kaufman



Customer Relationship Management (CRM) software brings customer data into focus, allowing businesses to sharpen their customer service, sales, and marketing initiatives. From big-picture snapshots to individual customer details, CRM offers versatile data management on demand. Each solution offers a unique palette of features defined by four essential functions: sales, marketing, support, and analytics.

Sales Force Management

Sales Force Management applications free the sales team to focus on what they do best, and leave the administrative tasks to the computers. Sales force automation covers everything from routine paperwork to sales lead distribution and tracking.

- Pivotal's Technology-Enabled Selling eliminates some of the "friction points that slow down the sales force," such as data entry and paperwork (proposals, contracts, faxes, etc.).
- Entellium's eSalesForce is a sales contact management tool that not only tracks sales but also automates lead distribution through a customized lead-scoring system.
- Oracle's Siebel CRM On Demand includes a powerful analytic tool to help sales reps manage their current accounts.

Other sales force management features include forecasting, revenue reporting, and complex recordkeeping, such as tracking commission for multiple reps on a deal.

Marketing Management

Marketing management software enables the marketing team to create more effective multi-channel campaigns. To this end, marketing automation tools collect data analyzing the success of past campaigns, segment the customer base for more relevant messaging, and evaluate pricing.

- Pivotal's robust marketing platform MarketFirst offers real-time metrics, allowing marketing teams to refine the campaign as they go.
- Other vendors such as Microsoft Dynamics CRM offer specialized marketing tools for email and search engine campaigns.

Customer Service and Support

Access to accurate real-time customer data is the key to efficient customer service. It's not surprising that CRM software originated as a data management tool for call centers. Today, CRM support functions still include the call center basics: call routing and immediate access to customer information, including purchase history and past service calls.

- Entellium, Oracle, and C2CRM go a step further, building a centralized knowledge base to help resolve common issues.
- C2CRM's customer service tool also includes workflow features, including a classification system that can prioritize customer requests by severity or issue.

Analytics

By bringing all three front-office functions under one roof, CRM also empowers executive decision-makers to access comprehensive, real-time data. This is the "360-degree view of the customer" Entellium and C2CRM promise. Data integration is the foundation for CRM's powerful analytics software.

- Applications such as Oracle Siebel's Business Analytics offer customized dashboards, where users can access reporting on sales trends, expenses, growth, and other metrics.

Today's CRM solutions leverage an enterprise-wide data platform to streamline all customer-facing functions. From the individual sales rep and the customer service agent to the senior executive, CRM offers the on-demand access to information that drives effective decision-making.

Sources

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About the Author

Clare Kaufman is a freelance writer who covers business and education topics. She has a Ph.D. in English.