The Getting Started Guide to

Customer Relationship Management

BNS AiO

Communication automation

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Introduction

Every good organization needs a CRM to keep their contact data organized and easy to find. What is a CRM? CRM stands for Customer Relationship Manager. CRMs allow you to store all of your customer contact information in one spot. This functionality makes the information easy to find, sort, and organize.

CRMs often offer other functionality like sales pipelines and tasks.

The main purpose of the CRM is to make sure that all employees that use the system stay organized and know how and when they should interact with customers. Tasks are assigned to each employee depending on their role and the stage of the sales pipeline that particular customer is in.

All of this will be explained in further detail later on.

Now, are you wondering why you should use a CRM? Here are a few facts to help you see the value of a CRM:

- With the use of a CRM, businesses see an increase in sales of about [29 percent](#).

- CRM software is used by [47 percent](#) of companies.

- The average ROI for CRMs is [$5.60 for every dollar spent](#).

BNS AiO offers a free CRM in order to help you organize you team and manage contact data. Take advantage of CRM software and see the results for yourself.

Part One

The Basics

Keep your data organized

A good CRM will allow you to easily maintain and edit contact information and have the ability to customize the organization to meet your needs. This means you can add columns for new data fields and add tags so you know details about a contact at a glance.

List management is also an important aspect of CRMs. List management allows you to organize contacts into various lists. This help you separate users based on whatever criteria you need like location, age, or interest.

But, how do you get your contacts into the CRM to begin with?

With the BNS AiO CRM you can upload lists of contacts to the CRM or add individual contacts manually. This allows you to easily import the bulk of your contacts into the database and add individual ones as they come along.

If you use the CRM with the BNS AiO 360 marketing automation platform, then you can have new contacts automatically imported from new signup flows, SMS opt-ins, and more. This means you always have the most up-to-date contact database with a CRM.

With a CRM you can take a look at each individual contact in the system. The individual contact page shows a detailed look at the user including what their contact information is, what tags they have, where they are in the sales pipeline, and any other fields you may have added. Scoring is another valuable aspect of the CRM that is located on each contact's profile page.

With scoring you can add and subtract points from each client depending on how they respond to your communications. For example, if you call a contact and it goes well you may give them 5 points. But, if it goes poorly you may take away five points. Scoring gives you an idea of how engaged each contact is.

Part Two

Pipelines

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Streamline your sales process

Pipelines are a great way to keep everything organized and identify your hot leads. They allow you to move customers through your sales processes and see where each contact is in the process whether it is prospect, lead, qualified lead, or whatever other criteria you need to use.

Pipelines help you keep a detailed record of where all your customers are at, how engaged they are, and where they need to go.

By looking at your pipeline you can see which leads are hot so you can focus more effort on them. You're also able to track how many times each contact has been contacted and see all the information you have gathered on them.

The pipeline process allows you to move customers through stages depending on the responses and engagement you receive from them. This helps you see on a larger scale which contacts are the most engaged and which are the closest to buying.

As a bonus, if you are using the CRM with BNS AiO 360, you can move contacts through the pipeline stages automatically based on how they react and engage with your automated marketing campaigns.

Part Three

Tasks

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Keep your team on track

Now, how do you know who is moving contacts through the pipeline, adding scores, and contacting them?

With tasks, you can assign certain jobs to certain people to do. For example, if you want contacts in a certain pipeline stage to be called by an employee, you could assign a task to that employee to do those calls.

You can assign the tasks, monitor which ones are done, see when they're closed, set due dates, and more. When you assign a task, the recipient will receive an email so they know they have a task to complete.

With tasks you will keep your employees organized and limit the amount of redundant work.

Conclusion

By using a CRM you can keep your employees on track, your contacts organized, and your sales pipeline in order. All of this increases your productivity and efficiency, meaning your marketing efforts will be more organized and thus more successful.

If you'd like more information about the bns aio CRM, check out

http://bnsmarketingautomation.com