



Choosing the Right CRM for Manufacturing

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Introduction

In the [first chapter](#) of this series, we discussed how CRM boosts customer engagement and employee productivity, and helps streamline your operation. This chapter addresses how to successfully select and deploy a CRM solution for your manufacturing organization.

Manufacturers run complex operations involving an intricate web of clients and suppliers. This creates challenges for ensuring everything is up-to-date, organized and consistent—and aligned across all departments and teams.

To keep business flowing smoothly, manufacturers turn to software like Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM). CRM is extremely valuable for creating a single view of your customers. This single view—spanning first contact to ongoing service and support—provides benefits both within your business and to the customers you engage with. CRM empowers manufacturing teams with greater efficiency, and analytics for fresh business insights needed to streamline production, delivery and inventory. Meanwhile, customers and prospects receive a superior experience—key to your business’s ongoing success.

But to acquire these internal *and* external benefits, you’ll need to do more than spend on new software. Successful CRM projects depend on people, process and technology working in unison. Indeed, according to Forrester Research, 70 percent of failed CRM projects flounder due to lack of adoption.

Manufacturers need a solution configured for their processes, from a vendor capable of providing training to ensure high adoption—as well as support and customization if needed. To achieve a good return on your investment, you also need to pay attention to the human side of implementation. This includes getting employees to understand how CRM is going to be of value to them. As you'll see, Maximizer CRM for Manufacturing backs you up in each of these areas.

“70% percent of failed CRM projects flounder due to lack of adoption.”
— Kate Legget, Forrester Research

Here is your guide to the things you need to consider on your way to a successful CRM implementation.

CRM and ERP: Two Interlocking Puzzle Pieces

Many manufacturers rely on Enterprise Resource Planning (ERP) software for inventory, delivery, financials and procurement. Because ERP is so critical to the business, it's tempting to see it as a one-stop solution for managing customer relationships as well as resources. But most ERP "CRM" functionality provides only integration with Outlook or Excel spreadsheets. Your ERP is extremely valuable, but it's really not appropriate for relationship management.

Think of CRM as the system to manage the front-office information—in contrast to an ERP which handles the back office. They're separate but interlocking puzzle pieces. CRM solutions with Sales, Customer Service and Marketing functionality provide the tools needed to collect and manage details about your interactions with suppliers, customers, partners and distributors, and more. Based on information stored in your CRM system, you're able to provide superior service to your prospects and customers. Employees acquire the capacity to visualize your sales pipeline, automate processes, track and manage support tickets, run marketing campaigns and perform numerous other daily business tasks—all through your CRM.

Determine Your Core Needs

You enter a shoe-store looking for footwear suited to your needs: running shoes for jogging, slippers for relaxing at home, and dress shoes for formal occasions. You pick the best option from the choices available and ask for a size that fits.

The process is similar for choosing a CRM solution: it works best when you start by evaluating solutions *designed* for your process and *sized* for your budget, applications, timeline and ROI target.

Begin with introspection. Gather the needs of each department and query employees on what they need to do, and what can be improved. Armed with the right information, you'll avoid buying software with expensive "bells and whistles" your team won't use, or a generic CRM that requires elaborate (and costly) setup to match your manufacturing-specific workflows.

“Armed with the right information, you’ll avoid buying software with expensive ‘bells and whistles’ your team won’t use.”

With your requirements list in hand, you can select a CRM solution scaled to your needs. As you'll see below, Maximizer CRM for Manufacturing ticks off each box on a typical CRM checklist.

CRM Checklist

Features

- ✓ **All-inclusive design:** An all-inclusive solution provides affordable CRM coverage across your organization. This saves money and empowers your teams with a full range of customer information at their fingertips. Just look at how full CRM coverage benefits sales: your salespeople can bring up service details in follow-up calls, impressing customers and identifying new up- and cross-sale opportunities. Maximizer CRM comes pre-built with modules for sales, marketing, customer service and analytics, at a lower total cost than most solutions made up of individual modules.

- ✓ **Mobile-enabled:** Field service excellence requires a mobile-enabled CRM. This ensures remote agents and technicians can re-schedule appointments on the fly and fetch critical information wherever they are—including product manuals, technical papers, SLAs and other forms.

- ✓ **Fast quoting:** The first company able to deliver a detailed quote after talking with a prospect is more likely to close the sale. Maximizer CRM offers a built-in quoting solution empowering your salespeople to quickly deliver proposals derived from a built-in product catalog. Fill and send accurate quotes in seconds and beat your competitors to cash.

- ✓ **Cloud and on-premise options:** Choose between our cloud and on-premise subscription options. With our cloud CRM, you're renting instead of owning, so we take care of hardware, maintenance and security—and pass on our efficiency savings—allowing you to trim IT costs and improve your margins. Cloud-based Maximizer CRM Live possesses the same customizability as our on-premise solution, and comes with free and automatic updates, unlimited live support, 24/7 mobile access, and the security of knowing your data is protected in Tier IV certified data centres.

Customization

- ✓ **In-house customization:** Many manufacturers adjust their CRM solution to fit their unique way of doing business by building custom forms, workflows and features. But customization can be prohibitively expensive due to the high cost of specialized third party consultants. At Maximizer, our in-house professional services teams provide in-depth customization expertise at very cost-effective rates.
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- ✓ **ERP/CRM integration:** Many manufacturers also need to integrate their back- and front-offices to ensure order information circulates properly throughout their organization. Our professional services team specialize in integrating CRM and ERP so front line staff can easily access invoice, order lists and sales information. This vastly improves the speed and accuracy of service, and eliminates repetitive admin work like copy-pasting data between applications.

Adoption

- ✓ **Training & Support:** An on-going, multi-level training curriculum is integral for on-boarding new users, driving adoption and deepening expertise across the organization. At Maximizer, we provide free weekly webinars and live customer support for all users with active maintenance agreements, to shorten the learning curve and help you maximize the value you get from your CRM solution.

Preparing for Deployment and Adoption

Successful CRM implementation depends as much on your people as it does on the solution you're buying. That's where your **"Adoption Team"** comes in. Made up of CRM champions from different departments, these people spearhead your education and outreach efforts.

Tips for company-wide adoption

Now that you've chosen your CRM solution— it's time to make sure your teams use it. Here are a few techniques for boosting adoption:

- **Get employees invested from the start:** Have your adoption team ensure all stakeholders support your decision by canvassing different departments before you install. You'll need to articulate a clear, consistent vision of how CRM makes their job easier to get them on board.
- **Tailor the platform to mimic your processes:** Sometimes users don't adopt a solution because its jargon and workflows don't align with your unique way of doing business. Customization and configuration can organize your CRM system with familiar workflows and terminology—shortening the learning curve.
- **Make your CRM the centre of the universe:** Integrate and centralize your customer information into one place, so all stakeholders find information where they need it—in your CRM. This helps streamline your sales processes, encourages adoption and simplifies training.

- **Eliminate redundant processes:** Towards centralizing information, consider making your CRM a one stop portal into other solutions. By integrating with your ERP, invoicing or tracking solution, you simplify data entry and access. This eliminates the need to switch windows to copy and paste information. The easier staff can complete tasks within your CRM, the more likely they are to use it.
- **Regularly assess your own education needs:** Don't leave it solely to your vendor to educate your employees. Assign your adoption team to outline real-world use-case scenarios relevant to your business, and decide where training is needed. Ultimately, your training curriculum needs to align with your team objectives to ensure maximum adoption.

Conclusion

There is no one-size-fits-all CRM. To get the best solution for your organization, it's important to determine your needs and select a system with the performance, functionality and flexibility you actually require.

Maximizer CRM for Manufacturing provides an all-inclusive solution pre-configured for your process, the flexibility to configure yourself, plus full service and customization support—to create an experience your employees will love.

To learn more about Maximizer CRM for Manufacturing, contact one of our advisors for a [free 30-minute consultation](#).

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



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