

CX MASTERY FOR MANUFACTURING



Some eat steak.
We eat software.



MANUFACTURING IS A PARTS AND PRODUCT DRIVEN INDUSTRY.

Manufacturer A needs parts from Manufacturer B to send its machine off to the end market. Within this transactional framework, concepts like “customer experience” (CX) are not tossed around as frequently as in other industries.

Sure, it’s important to keep customers happy. You still work hard to hit your quotas, quality check every part, and solve any issues that do arise. Yet, the follow-up to see if the customer experience is working is left up to sales, marketing or support teams, right? Why do plant managers or production leaders need to worry about their company’s CX strategy?

The answer is simple: The world is changing, and the manufacturing industry is changing with it. Customers are looking for value at every step of the customer journey, and the companies that actively seek to deliver that value have a significant competitive advantage. The more a manufacturer breaks down the silos between departments, allowing better communication along the customer journey, the better.



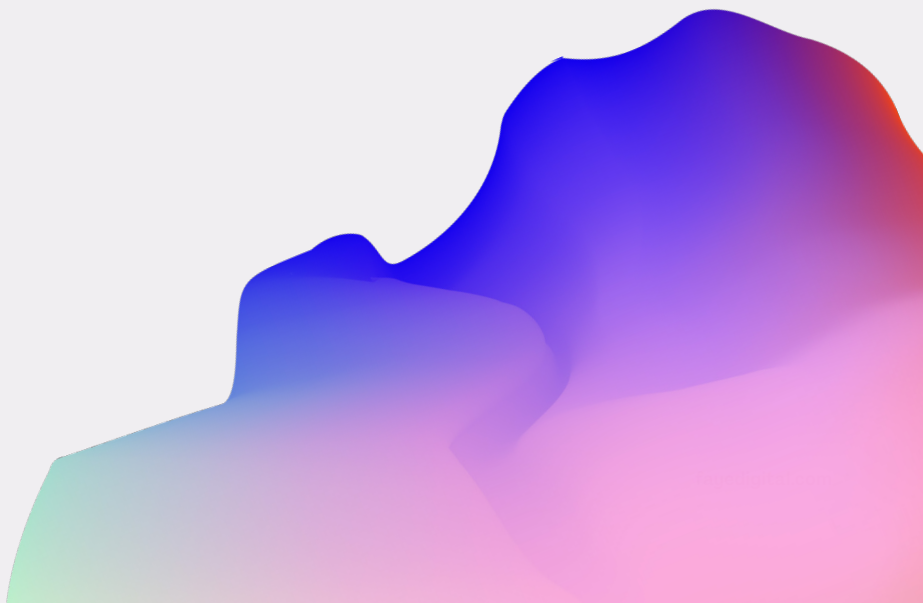
While production may track if parts are shipped on time and if the customer accepted or rejected them, they don't have insight into customer feedback from surveys the support team sends out. You don't want your plant manager walking into an audit with a long-time customer not knowing they are also reaching out to the support team with a complaint about another part.

Today's most successful manufacturers all have something in common: the willingness to adapt. Access to global markets has opened up countless new opportunities for your business, but at a cost: fierce competition from highly motivated rivals. Thriving in this new landscape means rethinking your company's workflows, product lines, and marketing ideas.

You're hardly alone: Manufacturers across dozens of industries increasingly lean into innovations in every aspect of their business, embrace fresh ideas, find more efficient approaches, and seek new partnerships. In ways that were once unimaginable, companies that are willing to adapt and evolve can connect with customers and clients.

If you want to stay ahead of your competition, it's more important than ever to keep your current customers happy and your future customers engaged. Outdated customer databases and spreadsheet-based reporting are no longer sufficient. Today, you need powerful, modern tools to manage your customer relationships. Even if your industry is small and you only have a handful of sales reps managing a global client list you can count on one hand, it's still essential to have the right tools for tracking their needs, decision-makers, contacts, buying cycles, and other data. Your competition certainly does.

At the base of the customer experience is how you manage those customer relationships. Most often, the right tool for that job is Customer Relationship Management (CRM), a comprehensive solution that's composed of customized tools and allows you to fully integrate your sales and customer data throughout your organization.





CRM IN MANUFACTURING

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MANUFACTURING IS VARIED IN DEFINITION AND SCOPE IN A WAY THAT MOST INDUSTRIES ARE NOT.

A high-end clothing manufacturer in California and an industrial steel factory in Michigan may seem completely removed from each other. They have entirely different processes, markets, supply chains, and vendor relationships. But they also have something in common: the need to manage customer relationships.

This commonality is easier to see when you look at the business through the eyes of the sales team. For instance, most manufacturers don't directly deal with end-market customers. Broadly speaking, most manufacturers have a B2B-centric sales structure and rely on dealers, resellers, and wholesalers for distribution.

As a result, manufacturers who directly sell to customers often find themselves using B2B sales tools and pipelines. Unlike strictly B2C firms,

manufacturers tend to have more complex needs in production and planning, which result in sales cycles that can easily exceed six months. The longer the sales cycle, the more critical it is to have up-to-date information about each opportunity's status. Your top priorities should be managing these accounts and courting new clients (while keeping existing customers happy and reordering). You want to cultivate a good customer experience for both new and ongoing relationships.

Yet, strangely, many manufacturers treat their sales departments as little more than afterthoughts. While a manufacturer may invest massive amounts of time and brainpower into refining a product design or simplifying a manufacturing process, the sales side of the business may be largely forgotten until a major problem crops up.



Even manufacturers that are on the cutting edge of their markets frequently rely on outdated sales technologies. These legacy sales-management systems are often cobbled together from a variety of existing tools.

This “spreadsheet CRM” can create a serious efficiency problem, particularly when data from those tools can’t be easily integrated into

Enterprise Resource Planning (ERP) software or other types of software for finance and accounting.

Without a modern CRM or CX system, these companies can only indirectly infer trends—after a significant investment of time to collect and crunch the data. Consider how difficult it is to answer these key questions when you’re using a piecemeal approach to CRM:

WHO ARE YOUR CUSTOMERS?

HOW MUCH DO YOU REALLY KNOW ABOUT THEM?

DO YOU KNOW THE DECISION-MAKING STRUCTURE OF THE COMPANY ?

WHO ARE THE GATEKEEPERS?

WHO ARE YOUR ADVOCATES?

WHY DO YOUR CUSTOMERS BUY YOUR PRODUCTS?

WHEN WAS THE LAST TIME A CLIENT ORDERED A PARTICULAR PRODUCT?

DO YOU KNOW WHEN AND HOW THEY PURCHASE?

ARE THEY AWARE OF YOUR NEW PRODUCTS?



Without the right tools for capturing this data, it's easy for important details to slip away. Order history with a client reveals clues about when their next order will happen, and how large the order is likely to be.

However, an understanding of why they prefer your products over your competition's is less obvious, but just as important. By collecting, aggregating, and analyzing this data, you can better understand your customers and their needs.

The more you understand a customer's procurement process, the easier it becomes to focus your sales efforts on getting the best possible result. You can create a better, more unified customer experience.

You may only need to contact a customer with a seasonal buying cycle a few times each year, while another customer may experience so much growth that it makes sense to contact them a few times each month.



Without CRM, this complex knowledge is far more difficult to share and act upon. It can be a challenge to even see this problem in a traditional sales setting.

On the other hand, CRM makes it much easier to track any kind of performance-based data in your sales.

By nature, salespeople tend to be optimistic, and see every lead as being just on the verge of making a purchase. But this outlook doesn't always line up with the reality of where each lead lies in the qualification process.

There is no objective way to see how many deals are stalled, on schedule, or approaching completion without the right data. After you have the right tools, it's easy to answer these questions.

No matter what the industry, data about your customers and sales should always play a vital role in strategic analyzing, forecasting, and planning. Forward-looking reports generated by CRM provide needed context and counterpoints to lagging indicators, such as production capacity, production runs, and raw material purchases.

More importantly, knowing more about your customers and their needs allows you to manage these relationships in new ways. This advantage provides immediate benefits, in terms of overall sales, but it can also help improve and optimize other aspects of the business.

CRM data can help improve cash flow, predict sales lulls and spikes in demand, and reduce transportation and inventory expenses. By using CRM-derived data, your analysts can even craft strategies for reducing churn or increasing overall profitability.



WHAT IS RELATIONSHIP MANAGEMENT?

This term often creates some confusion. In CRM, this definition often includes processes and workflows, which might not be obviously connected. For instance, account management and business development are often strongly tied to CRM.

At the same time, a comprehensive CRM system can play a role in a vast range of activities, including:

- **Marketing and salesforce automation**
- **Nurture and drip campaigns**
- **Service desk-related activities**
- **Relationship-based reports and analytics**
- **Project management**
- **Order management**
- **CPQ (configure, price, quote)**
- **Partner management**
- **Customer portals**
- **Account management**
- **Workflow management**
- **B2B and B2C customer management**
- **Customer-loyalty management**
- **Vendor management**

A complete CRM solution isn't about the software. Rather, it's about creating a comprehensive strategy for enhancing all customer relationships. The better those relationships are managed, the more effective the marketing, sales, administrative, and customer-service functions can become.

Most CRM software is built around four key capabilities:

- 1. Marketing Automation: Includes lead generation, email marketing, social media management, and campaign management.**
- 2. Salesforce Automation: Includes activity tracking, contact management, and deal tracking.**
- 3. Reports and Analytics: Includes business intelligence, forecasting, and commission management.**
- 4. Service Desk: Includes customer support and other post-sale activities.**



WHAT ABOUT ORDER MANAGEMENT?

While many businesses prefer a standalone ERP system, it might make more sense to build a CRM system from order management. For instance, in a transactional relationship with customers who are also distributors, it could be considerably more efficient to manage those orders through CRM.

Quoting is another process that's not generally connected with CRM. Many manufacturers face this situation. For a company that handles a high volume of complex quotes, the method for delivering them is likely to be a Configure Price Quote (CPQ) system.

Quoting is also part of sales, so it often makes more sense to include the CPQ process as part of CRM. When the deal is closed, those products often become assets. So, a CRM system is the ideal place to track sales-related data (such as support contracts, warranties, and expiration dates).

CRM can also play a huge role in service desks. Manufacturers can think through if customers need login information to submit tickets. What happens if customers want to see their past orders, or track the status of a current order?

In these situations, the goal is the same: Use all available data to create a 360-degree view of the customers. It doesn't matter what the source of the data points is. (Even third-party vendors can play a big role.)

The important thing is that all of this customer data should be piped into a CRM system. The more robust the customer data, the better the relationship with the customers can become.



HOW USE CASES SHAPE CRM/CX

Every business has a unique set of problems they are hoping to solve by implementing CRM/CX. Some companies simply need a tool for connecting their marketing automation to their sales pipeline, while others are looking to completely overhaul and streamline their marketing, sales, reports, and service workflows.

In every case, the CRM solution should always be dictated by the company's use case. This solution requires building a profile of the company's processes, and looking for problem spots in their workflows. To sketch in the details of these use cases, you can ask yourself a series of simple, yet probing questions:

**WHAT INDUSTRY
ARE YOU IN?**

**WHAT MARKET DO YOU
WORK WITH?**

**WHAT IS YOUR SALES
PROCESS?**

**WHAT IS YOUR CURRENT
WORKFLOW?**

**WHAT PROCESSES, TOOLS,
OR SYSTEMS DO YOU USE
AS PART OF YOUR CURRENT
WORKFLOW?**

**WHAT PROBLEMS DO YOU
WANT THIS CRM SYSTEM
TO SOLVE?**



These questions may seem simple, but the answers often reveal significant details about the use case. By helping the client walk through their current workflows, it becomes much easier to see where the real problems are, and what kind of CRM or CX solution makes the most sense.

Many smaller manufacturers often aren't even aware that they need CRM or CX. They look at efficiency on the plant floor first, not in an office environment. Instead of having a standalone solution, they rely on a cobbled-together system of standalone tools, such as Outlook, Google Calendar, and Dropbox.

These companies are able to manage their current customer relationships through sheer tenacity. This approach might be somewhat manageable for a small, dedicated team, but every additional customer brings it one step closer to total collapse. It's simply not a scalable solution, and it severely limits the company's ability to grow and adapt. Even a minimal CRM solution could provide tremendous benefits.

It's one thing to craft a custom CRM solution for a small or mid-sized business, but what about a huge organization? The larger the manufacturer, the more complex the customer relationships become. So instead of a single CRM use case, there could be dozens.

For instance, there might be a single use case in a company with thousands of employees just for managing opportunities that don't touch leads or accounts because the organization is so complex.

There may also be distinct divisions within the company that handle completely different lines of business. Perhaps some subsidiary businesses have their own use cases, but they also need to share customer data with each other.



HOW IT COMES TOGETHER

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UTILIZING YOUR CRM AND OTHER SYSTEMS CAN CREATE THE BEST CUSTOMER EXPERIENCE. HOW?

Because when you create efficient and streamlined systems for your employees, they have more pertinent information about the customers at their fingertips.

Here's an example: A parts manufacturer is struggling to keep up with lead generation and prospective sales. The company used QuickBooks as their primary sales management tool, which was fine for when it was a smaller operation. Yet, as the business grew to include new services and products, there needed to be a better way to manage and follow-up with customers.

Instead of sifting through thousands of inquiries, the manufacturer of the parts has adopted a CRM system and now has one place to go to for all this information. Whether the inquiry is coming from email or a webform submission, sales reps go into the CRM, respond to inquiries. They can also see all the different ways a client has reached out and

what the last correspondence was, as well as order history. This creates a much better customer experience than them waiting endlessly for a response.

Instead, a sales rep can immediately follow up and know their use case. This extends to proper documentation as well. The parts manufacturer can store all the documentation of required ISO certifications and regulatory quality standards they adhere to for a particular industry or customer.

With everything at their fingertips, in one place, their process is greatly streamlined. Communication issues are greatly improved by using a CRM or CX system and improving processes because of their additional features and options.

There are many business enhancements that can be made with a well-functioning CRM or CX system. Some of these processes are better served to the different-sized companies.



CX BENEFITS FOR BIG MANUFACTURERS

One of the less obvious advantages of integrating CX into manufacturing systems is higher-level integration with other operational systems. This benefit is especially useful for manufacturers with complex assembly and warehousing setups throughout multiple facilities. Essential details (such as sales projections) can be shared with procurement, assembly, and warehousing managers to create more efficient processes.

One benefit of a group of manufacturers that the same parent company owns involves enhancing horizontal and vertical integration. In this sense, CX data serves as the sales-reporting and forecasting equivalent of an ERP solution. By sharing CX solutions with individual sales teams, the resulting data can be crunched by the parent company, which allows managers and executives to see a much bigger picture.



There are other advantages to CX, particularly for companies that already have existing integrations across multiple divisions. One great example is the role that CX plays in customer support. Most CRM and CX solutions are designed to follow the customer throughout their lifetime, including modules for support tickets, warranty details, RMA tracking, and contract management.

In an industry where customer support is still largely handled via email, CX provides game-changing tools. Even when each of these divisions rely on specialized solutions (such as CPQ software), it's always possible to integrate CRM/CX data by using third-party tools and plugins. That way, you can provide a more robust view of overall performance. This tactic allows each branch of the company to be more informed about future demand, while also delivering exceptional transparency to the parent company.

A group of manufacturers owned by the same parent company also has the benefit of enhancing both horizontal and vertical integration. In this sense, CX data serves as the sales-reporting and forecasting equivalent of an ERP solution.

By sharing CX solutions with individual sales teams, the resulting data can be crunched by the parent company, allowing managers and executives to see a much bigger picture. Here's another exciting use case, particularly for commercial and industrial manufacturers: the new frontier of IoT.

Data from IoT-ready machines on the factory floor can provide instant feedback to customers looking for real-time data about performance and efficiency. You could access this data from a CX-connected customer portal. This benefit allows clients to have up-to-the-minute details about their orders, without placing an additional burden on your support staff.



CX BENEFITS FOR THE SALES TEAM

If sales reps use CX as a tool to demonstrate that they aren't getting enough lead flow (or that their geography is weak, compared to another rep), CX data can help them make their case. For instance, if a sales rep is worried that they don't have enough deals in the pipeline, they can use CX to demonstrate it.

How have many sales organizations lose exceptionally talented salespeople for not receiving enough opportunities? Or because they felt mistreated due to external factors preventing them from making their quota for that quarter?

From an employee-management perspective, it's always better to discuss these kinds of problems by stating cold, hard facts. A CX objectively collects and reports sales data, and having access to these kinds of reports can give the sales staff a new perspective on their performance. The more the staff values CX data, the higher their overall adoption rate will be.



With CX-reports driving the sales meeting, the focus changes. Instead of being an off-the-cuff general update from other team members, the meetings now focus on identifying and solving specific problems. Without the more loquacious team members talking about their hopes and dreams regarding the biggest deals in their pipeline, the other reps have something more to do than watch the clock until they can get back to work.

A CX-focused meeting cuts out the noise, and focuses on the solution. If a rep is struggling to understand why an opportunity isn't moving forward, the rest of the team now has the chance to offer their collective advice and insight. These meetings allow the entire sales team to leverage their combined experience, to solve problems (both big and small).

Here's an example: A company manufactures and sells heavy-duty farm equipment, and there's a new rep named Chris. He joined the team a few months ago, and only has a basic understanding of the

farming industry. Chris has worked hard, and has a big opportunity to sell two combine harvesters to a new customer. This deal is worth nearly \$1 million in the first year alone, but it's been stalled for almost a month.

At a typical sales meeting, Chris would probably just say, "I haven't closed it yet, but I'm working on it." In a CX-driven deal, the sales manager would say, "I see that this two-combine deal has been stuck for a month. What's keeping it from moving forward? Is there anything we can do to help it along?" In all likelihood, Chris will explain his situation at this point.

Then the other reps could ask him questions, tell him how they solved similar problems in the past, volunteer to sit in on his next call, or provide other kinds of assistance. Instead of simply being a status report, a sales meeting has now become a form of collaborative problem-solving. After a few minutes of discussion, Chris should have several new ideas about how to nudge the deal forward.



BUSINESS INTELLIGENCE & KPIS

Executives and managers who are used to working with ERP data state that a typical sales performance can be maddeningly vague. However, without CRM or CX in place to provide real data, the optimistic guesswork from a sales meeting is the only available option. It puts everyone involved—from the sales team to the C-Suite planners—in the horrible position of making decisions and plans that are based on flawed information. But everything changes with the introduction of a CX or CRM system.

By providing a strong structure to build workflows around, it allows companies to generate reliable sales data. These results add up to dramatic improvements:

- **Time-consuming tasks can now be automated and complex.**
- **Inefficient processes can be streamlined.**
- **The business generated by intelligence becomes deeper, richer, and more reliable.**



A properly implemented CX or CRM can provide many different types of pipeline reports. Here are a few examples that can be used to drive a sales meeting:

- **General pipeline reports show opportunities according to stage and user.**
- **Opportunities show the length of time in each stage, from latest to earliest.**
- **A historical-velocity report (which is cyclically adjusted to the season) shows an opportunity for movement across the entire sales team.**

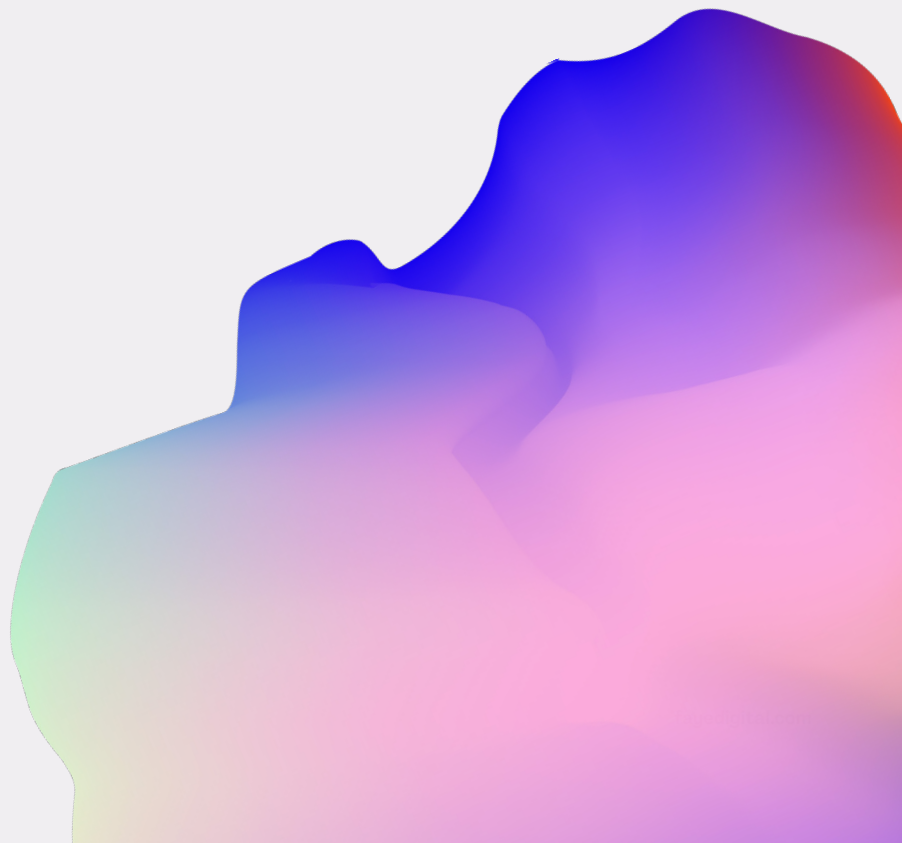
CRM is also extremely useful for key performance indicators (KPIs), goals, and forecasts.

The measurement of current team performance against the sales forecast should be a standard part of every sales meeting.

Most enterprise-grade CRM systems even include forecasting modules, and allow projections to be weighted (based on the probability, phase, and amount).

Using a CRM or CX system can create huge efficiency boost, but as with all software, it needs to be used properly.

So, how do you achieve this?





CRAFTING A CX STRATEGY

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BY DEVELOPING A STRONG CX STRATEGY, MANUFACTURERS CAN MEET – OR EVEN EXCEED – CUSTOMER EXPECTATIONS.

They can rapidly adapt and refine products based on customer feedback, supply chain changes, and even IoT usage data. Manufacturers can even use their CX strategy to drive prospecting and sales, increase conversion rates, boost product ratings, and improve customer retention.

To understand how a CX strategy can deliver results in manufacturing, it helps to split the customer experience into three core elements:

**Culture**

What is it like to be a customer working with your company? How easy is it to order products, provide product feedback, or learn more about your products? How difficult is it to resolve product or order issues?

Process

How does your company use customer data? How much of a role do customer and IoT data play in decision making? Is critical decision-driving data readily available, or is it hidden away in data silos?

Technology

Is your company's technology optimized to streamline processes? Does your technology make it easier to be a customer? Does it provide meaningful insights for product design, order management, customer satisfaction, marketing, and sales? Is there an ongoing investment in new technology?

All three of these elements play a role in developing a strong CX strategy. The most obvious connection between them is the customer journey. By examining the company culture, it's possible to identify underlying problems in customer acquisition, satisfaction, and retention. When a company addresses disconnects and gaps in process, it can reclaim extremely valuable insights into customer frustrations, expectations, and purchasing priorities. By investing in technology improvements, the company can substantially streamline operations, remove barriers to entry, and develop better products based on actual customer needs.



CX STRATEGY BENEFITS

These CX strategy improvements benefit more than just the customer. A well-designed and implemented CX strategy can also yield serious benefits for distribution partners, retailers, suppliers, and even internal teams. The benefits are felt throughout the entire business network, including the end customers.

This approach to CX strategy can also provide a greater degree of flexibility and freedom for manufacturers.

Updating your approach to the customer journey becomes less daunting to develop targeted plans to improve customer acquisition, build strong cross-channel marketing, or improve social media and online visibility.

Your company no longer needs to rely on retailers and partners to provide your company with customer insights and product feedback. You now gather that information as a direct result of a comprehensive CX strategy.



A great example of this concept in action would be incorporating IoT data into your product designs. When applicable, IoT data can provide your company with clear information about how customers are using your parts or products, and where they fall short of expectations. This information can then be used to improve not only the part or product itself, but also the customer experience of using it. This same CX data can inform everything from pricing to content marketing priorities.

So, how does a manufacturer actually develop a useful CX strategy?

No two companies are the same. CX strategies need to be crafted individually, focusing on what works for their market and customers.

However, there are some general concepts that apply broadly to every CX strategy.

Keep Focus on the Customer

Today's customers have higher expectations, and retention of these customers is becoming more of a challenge. What always worked in the past may not work anymore. An effective CX strategy helps you keep your customers. How? Because it is easier to become a customer, and stay a customer. It establishes a strong relationship between the manufacturer and customer, allowing customers to provide feedback that improves the parts or products that they purchase. Feeling like they have a say in their needs makes customers more likely to stay with a manufacturer over a competitor.

Create Data-driven Strategy

Make use of your product and customer data. Use this as an opportunity to liberate your data from department-level silos in customer service, sales, product development, and marketing. Use that data to inform your planning, and to gain a clearer understanding of customer needs. When possible, integrate those insights into other parts of the business, like your product development, online customer experience, and even marketing

Establish Clear Goals

An effective strategy should focus on achieving a specific outcome. In the case of CX strategies, the structure should be arranged with a clearly defined goal in mind. A CX strategy for customer retention will have a different set of priorities than one aimed at acquisition. Establish a methodology for measuring progress, and be willing to adjust and refine those methods over time to progress toward your goals.

With the right CX strategy in place, manufacturers become more resilient to the ever-changing nature of the business. Data-driven decision making allows for better planning, and avoiding needless risks. Improving the customer experience makes it possible to improve every aspect of the customer relationship, from loyalty to part or product ratings. By streamlining operations with CX in mind, manufacturers can even become more agile, responsive, and competitive.

Optimization is Where CX Strategies Shine

It's important to remember that implementing a CX strategy isn't a one-time thing. It's an ongoing process of optimization that involves every step of the customer journey. Progress needs to be measured, scoured for new insights, and then used to inform further strategy and planning. It's something that deserves a dedicated line item in your budget, and is constantly revisited with ROI in mind.

Invest in the Right Technology

Improving the customer experience starts with measuring and analyzing data from every corner of your business. Much of this data is already available through your CX, CRM, ERP, support desk, and other business solutions, but other important pieces may require additional investment and development. IoT, marketing automation, website analytics, and even supply chain data can also play a role in CX optimization. Bringing all these elements together is an important investment, and it's not the time to start cutting corners on the budget. On the next page are the suggested technologies that can help a company master CX in manufacturing.



TECHNOLOGY STACK FOR TO MASTER CX IN MANUFACTURING

No matter which part of the industry you are in, there's one constant: technology is a driving factor in manufacturing success. It's how suppliers are engaging with manufacturers. It's how manufacturers interact with customers.

The following are some of the most common technologies used for CX in manufacturing:



CRM

As explained above, a CRM system is crucial to your CX. First things first, manufacturing analytics improve customer satisfaction in two key areas:

1. **Operational efficiency**
2. **Decision making**

Without a modern CRM or CX system, manufacturers can only indirectly infer trends. The more you understand a customer's procurement process, the easier it becomes to focus your sales efforts on getting the best possible result. Analytics can lower costs, wait time, and improve the overall experience.

Chatbots and AI-based Customer Service

Artificial intelligence and chatbots are often used on websites to help answer questions to customers. Chatbots can be quite intuitive and can engage without the need to engage with a call center. AI Chatbots support day-to-day operations. Customers can save time by conversing with a chatbot about appointments, shipping updates, product information, or facilitate general troubleshooting.

ERP

It's almost impossible to overstate the impact of ERP solutions in the modern business world. Over the last few decades, ERPs have replaced disconnected workflows, incompatible business tools, and siloed fiefdoms of data. Overall, ERP is dramatically increasing overall efficiency, so it's game-changing business technology (to say the least).

Every business needs basic accounting tools. But without an ERP system in place, there's often a disconnect between sales, inventory, and payments. Luckily, ERP solutions provide a vital link between operations and accounting, which makes it much easier to follow transactions throughout every stage of the process.

Marketing Automation

Customers must navigate a complex ecosystem of players throughout their journey. A highly relevant engagement approach versus traditional methods will retain and keep new customers.

Marketing automation gives marketers in manufacturers a real chance to plan seamless customer journeys across multiple platforms and touchpoints. It enables better lead targeting from the top of the funnel to the bottom.



INTEGRATING YOUR SOFTWARE

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CREATING A POWERFUL CUSTOMER EXPERIENCE MEANS CREATING A SEAMLESS EXPERIENCE.

Connecting all your major software platforms will improve efficiency and help you realize the goal of a 360-degree customer view. This is especially true for your CRM/CX and ERP systems.

The entire goal of a CRM system is to have a 360-degree view of your customer. But a typical CRM system doesn't have all the data companies need to grasp the people who buy their product or service thoroughly. CRM is the front-office system of a business, since it holds all of its information on customers.

Meanwhile, ERP is the back-office system, with information on accounting and order management. Syncing your CRM and ERP systems can be critical, but you don't need to transfer all data from one program to another. Some syncs should be unidirectional, while others should be bidirectional.

By properly syncing a company's ERP and CRM, you can improve efficiency, eliminate information silos, create and maintain internal controls, and help with inventory visibility.

This connection also lends itself to more accurate business forecasting, and it creates a better overall CRM strategy. By combining your back-office and front office systems, employees can have a better user experience and a more stable center of gravity. But how does a company sync data between the two systems? What data points should you pull, and what will that data be used for? What are the best practices for integration? How does combining these programs result in a 360-degree customer view?



TOP REASONS TO INTEGRATE CRM AND ERP

The integration of CRM and ERP is key to achieving a 360-degree customer view. When you sync these two systems together, you have access to all of this information about your customer: order statuses, shipment information, payments, past invoices, overdue items, and an overview of the customer journey.

Rather than switching programs to access this information, the data is now stored in a single program. This feature can be useful in many situations. For example, imagine a member of your sales team is performing a quarterly check-in with a customer. In that case, the salesperson may need to answer questions about past orders, see the status of a current order or shipment, and get an overall feel of the customer journey.

Suppose you've integrated your CRM and ERP. In that case, all of this information is available in one system, so the sales representative doesn't have to switch programs to access the relevant data repeatedly.

In addition to saving the sales team's time, integrating the CRM and ERP systems saves time during data entry. Instead of manually copying data from CRM and keying it into ERP, the information automatically transfers. And since there's no need to duplicate data, there are fewer data-entry errors.

Another important aspect of a CRM/ERP connection is the opportunity for mobile application. While CRM programs have mobile options, most ERP programs don't. (Or the mobile functions are limited.) But by combining ERP data with a CRM system, back-office data becomes available via mobile devices through the CRM program, which can be helpful in many different situations.

For example, an agricultural company might need to send a technician into the field to help a customer. And the customer might ask for information about past orders, or the technician may need to look up protocols for leasing equipment.



A successful CRM/ERP integration means the technician has easy access to all of this information on a mobile device. But if your ERP and CRM aren't talking to each other, this data is harder to find. Integrating your CRM with your ERP creates a better user experience on desktops, laptops, and mobile devices. If you simultaneously use a marketing automation platform, CRM, ERP, inventory system, and other programs, it creates a watered-down user experience. So, integrating CRM and ERP improves the experience, as long as users adopt the improved system. A successful integration can help solve other problems, including staleness of data, problems with user entry, and lack of business intelligence. Integrating these two systems can also help with internal controls.

If your ERP and CRM aren't connected, some employees might end up in programs they shouldn't really be using, while they're trying to access data they need. For example, if a member of the sales team needs to view a quote, they'll likely have to navigate into the accounting system. But ideally, only members of the accounting team should be accessing this program.

By integrating back-office and front-office data, information is easier to access in the proper systems, so internal controls are easier to maintain. In addition, ERP/CRM integration helps eliminate silos, since all information is accessible in one place. This feature also improves visibility about important inventory information.

Armed with this data, a company can produce more accurate estimates, orders, and quotes. After combining ERP and CRM data, you can see important business and customer information, which can help with forecasting and business intelligence.

If you've worked with a customer for many years, you can see a summation of past orders for a specific amount of time (such as three years), which is critical for forecasting high-priority customer statuses.

In other words, you can understand where your revenue is coming from. This task would be much harder without combining CRM information (which includes the possibility of creating an outline from forecasts) and ERP information (which includes lagging data and past orders).

Overall, merging ERP and CRM data leads to improved productivity and efficiency. Every company has metrics they're striving to reach. By combining the data from these two systems, you can drive these metrics in the right direction, and help companies reach their goals. In reality, most of the information the end-user is asking for is usually the same data across-the-board, but it needs to be presented in different ways. To help streamline the ERP/CRM connection process, first transfer the data from the ERP into the CRM, then slice up the information for the end-user as needed. After you've integrated the data into CRM, parse it into the format the end-user prefers.

Some common items transferred between systems include:

- **Customer Data**
- **Accounts & Contacts**
- **Quotes, Orders, & Invoices**
- **Payments**
- **Shipments**
- **RMAs & Warranties**
- **Headers & Lines**
- **Historical Sales Data**
- **Product Catalog & Inventory**



At Faye, we love software. We eat it, breathe it, and build it. Our mission is to make the best software in the world even better by helping clients lead the way with software strategy, deployments, integrations and technical support.

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