



Guidance for businesses that install air conditioning, boilers, kitchens, mining equipment, landscaping, or any other type of equipment on-site.

# Customer Relationship Management (CRM)

## 6 Tips for Specialist Contractors

CRM guidance by:



[www.onsite.solutions](http://www.onsite.solutions)

# Know your customer touch points

Businesses like yours have different customer touch points to other types of business. These touch points contribute to the overall customer relationship.

These “touch points” might include:

- ⇒ Concept design
- ⇒ Tender Communications
- ⇒ Co-ordinating site visits
- ⇒ Site visits, at all project stages
- ⇒ Equipment commissioning and maintenance
- ⇒ Contract Administration

A kitchen installer for example could make a superior impression by how they collaborate with their client to develop a custom kitchen design.

Decide which “touch points” are most important to the quality of your overall relationship with the customer.

## Focus on your users

Identify all users of the system. Think through their primary **roles**, and responsibilities.

Be clear on the overlaps and distinctions for each type of system user with other types of system users.

For example, a tradesman on site will interact with the system very differently from a sales person based in the office.

Each user should have a dedicated interface with the core functions that they will need to access easily.

Don't clutter up the interface with functions users won't need. Keep things as simple and uncluttered as possible for each user.

### **Our Tip:**

Use a "day in the life of" narration to help articulate the concerns and activities of each user.

## Understand your own business processes

CRM offers opportunities to gain new efficiencies.

If you have adopted continuous improvement methodologies such as LEAN or ISO9000, use those methodologies to understand how your processes will change.

Ensure they are changing for the better, and that you don't "throw the baby out with the bath water". (For example, don't replace a face-to-face interaction that customers clearly value, with an automated email interaction.)

Try to keep the bigger picture in mind rather than become burdened with short-term demands from all of the staff who will use the system.

Be conscious (particularly if you are adopting a CRM system from a large vendor who may advocate you change internal business processes to fit their software) of how the technology will impact on the experience of your customers.

**Our Tip:**

As regards functional features, it is advisable to start small and add new functions regularly.

## Should you choose a large vendor or a boutique service provider?

A large vendor often looks for a one-size-fits-all solution for everyone except the biggest companies who use their software.

Also keep in mind that large vendors add and remove features and functionality according to their own imperatives, and that they have a lot of power over whether certain key features should command higher prices.

They may even try and shoe-horn you into solutions not built around your precise business requirements.

If you are a SMB, remember that senior staff of large CRM vendors often become less available once the main system installation is complete, leaving you to deal with more junior technical staff who have lower business awareness.

### **Our Tip:**

Finding a CRM genuine partner, someone who really understands your business, will pay you back.

## Customising your CRM solution

Choose a CRM system that is flexible and scalable.

- ⇒ Simply “configuring” software is inherently limiting. Often, the optimum solution to your specific business requirement will be most quickly implemented through writing code.
- ⇒ Ask your provider about libraries of pre-existing functions they have developed that might fit your present and future needs. (Often they will have modules and other units of code that come close to what you need, and can be modified to your exact requirements.)
- ⇒ Choose a CRM partner who has an understanding of your business. The key skill is ability to choose the appropriate concepts and structures to support your business needs.
- ⇒ The underlying database design of the system is key. Can it model all the roles and relationships involved in your sales process?

### **Our Tip:**

Implementing software is an involved social challenge, with people sharing complex ideas and opinions. That is challenging enough without adding barriers of culture, language and lack of business experience.

## Integrating with other software

Software applications such as accounts software and payroll software are used in most businesses.

Businesses may have made investments in other expensive software systems.

Most cloud providers in today's market focus on one particular niche business problem, dedicating themselves to solving that problem better than anyone else.

So make sure your CRM software can “talk” with your other software.

Modern integration techniques and standards like REST facilitate the retrieval and sending of data from and to other systems.

Ask your CRM provider about their software's capability in this.

**Our Tip:**

Identify existing standards for data exchange within your industry.