



Yellow!

**The small business
guide to customer
relationship
management (CRM).**

eBook

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What is CRM and why does it matter?

CRM (short for customer relationship management) refers to practices, strategies and tools you use to manage relationships and interactions with your customers.

A complete CRM system does two things. Firstly, it keeps all your customer information in the one spot. This includes:

- Contact details
- Service history
- All communications
- Invoices paid and unpaid

Secondly, it delivers one simple platform to communicate with your customers. This includes:

- Email marketing
- Quotes and invoicing history (paid and unpaid invoices and receipts)



Businesses large and small use CRM platforms to compile customer data. From here, a business can access details on customers' personal information, purchase history, buying preferences and behaviours.

Instead of sending invoices via one system, email through another and jotting down customer details in a notepad, a good CRM system should

manage all this for you. In other words, CRM allows businesses to manage customer communications from a single place and learn more about what customers want and how they interact with the business.

These insights are worth their weight in gold when it comes to providing great customer service and turning leads into conversions!



What is CRM and why does it matter?

Components of a CRM platform.

At its most basic level, a CRM platform is designed to consolidate customer information into a single database that customer-facing teams can easily update and manage.

Nowadays, though, many modern CRM platforms have additional tools to help businesses connect with customers, reduce the need for manual admin and track performance over time.

These tools can include:

Marketing automation – These are features designed to auto trigger a marketing message. For example, a new prospect being entered into the database might trigger an automatic welcome email or other marketing materials.

Customer self-service – This allows customers to schedule appointments, make payments, register for events and more.

Location based services – Technology that can create geographic marketing campaigns based on customers' location, sometimes integrating with popular location-based GPS apps.

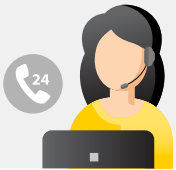
Lead management – Store all your leads in the one place. Input data on prospective customers and then track and analyse this info.

Workflow automation – Reduce manual admin by automating repetitive tasks such as appointment reminders or billing.

Analytics – Reporting tools that provide insights based on customer and campaign data. This drives better customer satisfaction rates and more effective marketing efforts.



CRM – fast facts.



Provide a better service 24/7.

Fact: 70% of leads are lost due to not being responsive immediately (phone or text message) – [Forbes](#).



Advertise effectively to your customers.

Fact: Email marketing drives more engagement than any other marketing channel ([eMarketer 2016](#)).



Get more returning business.

Fact: Transactional (related to action) emails are x8 more effective ([Experian](#)). Best time to upsell is soon after the completion of a successful service.



Quick response to clients contacting – push notification.

Fact: Slow or non-response is the most common reason to lose business (70% of leads lost) – [Forbes](#).



Keep notes, files and tasks organised.

Fact: SMEs with a fully utilised CRM system can increase sales by 29% ([Forbes](#)).



Build your customer relationships.

A reliable CRM platform provides a solid foundation for building long-term customer partnerships. Check out these clever ways CRM software can help you nurture and retain loyal customers.

Target customers with personalised offers.

The more you know about your customers, the more you can tailor your approach to each individual. Using your CRM software, you can review customers' purchase histories to create targeted special offers based on each customer's preferences and behaviours.

Reward your highest value customers.

With insights into customer value at an individual level, you can provide incentives such as discounts or special offers to your most profitable customers to encourage loyalty. You can also leverage these customers



for cross-selling opportunities to increase individual customer value.

Stay on top of customer bookings.

Scheduling features in CRM software are useful for organising and staying on top of appointments and meetings. This allows you to include day-to-day admin such as booking confirmations and reminders in your CRM system,

so you have a clear view of all your customer interactions.

Personalise your communications.

CRM software helps make it easier to see your customers as people rather than numbers. Customer-specific notes and user insights allow you to personalise your messaging and adjust your outreach strategies to increase relevance.



You've created a customer database. Now what?

So, you've got a solid customer database under your belt and now you're probably wondering "What do I do with this data?"

It's time to take the next step and choose a dedicated CRM platform to start driving results for your business. Exciting times ahead!

Tips for choosing and implementing a CRM platform.

Half-baked CRM implementation is almost on par with having no CRM strategy at all. Here's what to consider when choosing and rolling out a CRM platform.

1. Have clear goals.

It's critical to understand your business' needs and goals before evaluating the options out there. This way you'll be on the lookout for a CRM system

that covers off all your needs – as not all CRM systems do the same thing. Some only allow for email marketing, while others are comprehensive but complicated.

So, what do you want to achieve from your CRM?

- Better communication with customers?
- Turning leads into sales?
- Cutting down on manual admin tasks?

Write a list of your current customer relationship roadblocks, what problems you want your CRM platform to solve, and what measurable goals you'd like to hit.

2. Know what your customers want.

Although having a CRM can help with understanding your

customers' needs and behaviours, it's also useful to leverage customer behaviour from the outset so you can choose a system that meets your users' specific requirements.

For example, if you have customers that want to be able to book services online, it would make sense to choose a CRM with self-service booking capabilities.

3. Choose a CRM platform that will make your life easier, not harder.

One of the huge benefits of having a CRM platform is the ability to automate repetitive tasks and cut down on manual admin. Make sure that the system you choose has the capability to do this.



You've created a customer database. Now what?



4. Make it customisable and scalable.

It's critical to think long-term and understand not only what's needed today, but also what you'll need months or even years down the track. With that in mind, look for a CRM

platform that can be tailored to meet your growing needs, such as through pricing tiers or optional feature add-ons.

5. Offer training and support.

When rolling out a CRM platform to your team, it's

important to provide training on the ins and outs of the system, and offer ongoing support in adopting this new way of working. Choosing a CRM company that offers local support can make this process much smoother.



Pocket Office: Built for small business.

Pocket Office is Yellow's new CRM platform designed to give business owners the power to manage their customer interactions from end-to-end.

This includes sending invoices, taking online customer bookings 24/7 (and housing this information in the platform), setting up appointment reminders, organising staff and creating email marketing campaigns. Here are some of the ways Pocket Office's features enable smarter CRM for your business:

Integrated bookings.

From your Yellow Online business listing, to Facebook, to your website, our bookings request feature can be applied across the internet,

so customers can book in real time from anywhere they're searching. This information is then recorded in Pocket Office and included in your customer's profile.

- Maximise your online leads with a bookings button that can sit everywhere you're listed.

Create effective marketing campaigns.

Got a new offer? Create and send a branded email or SMS campaign. Measure success via reporting on open rates and click through.

An easy invoicing system.

Issue quotes, invoices and receipts. Track payment status, send automated payment reminders, collect credit card payments and create discount coupons.

Customer contact details.

Our system automatically (and safely) records any customer who gets in touch online. Then we hang onto their details for you.

Stay in touch with your customers.

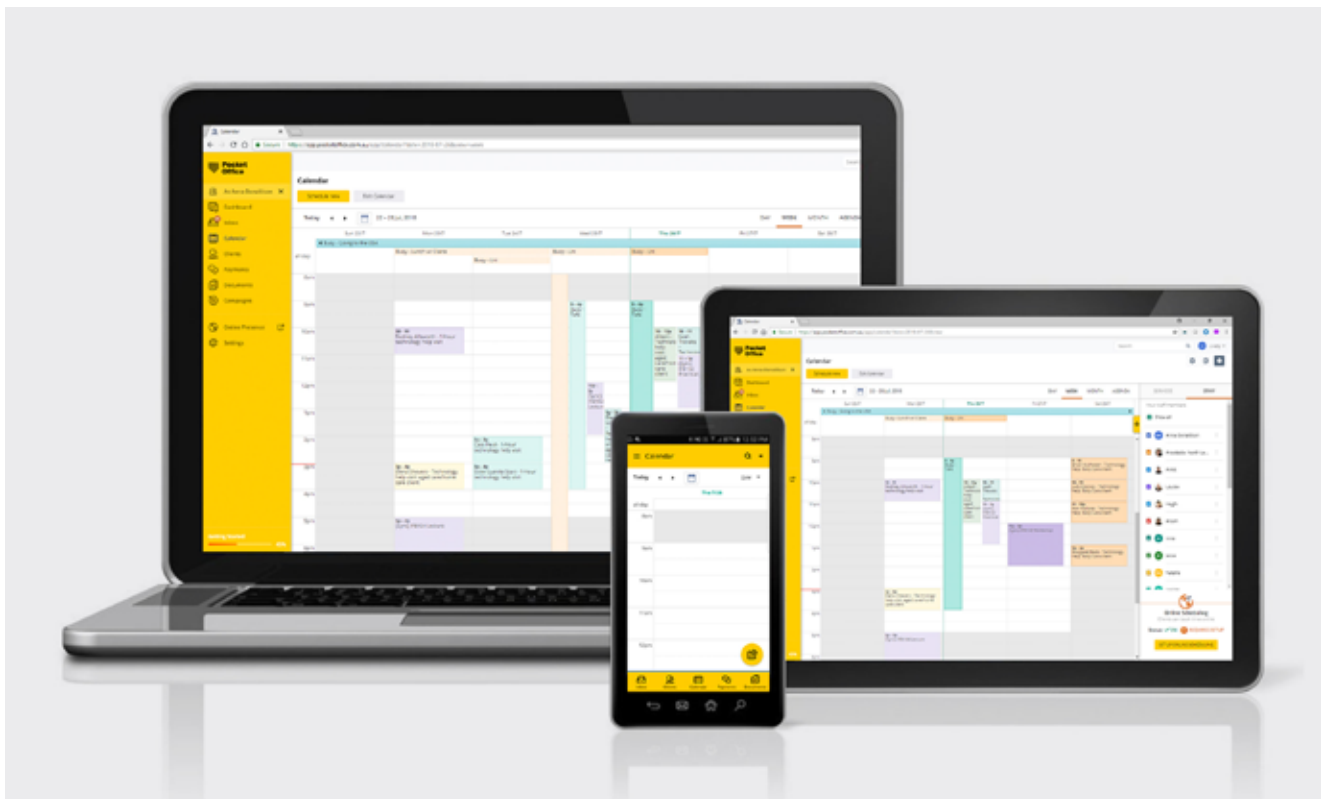
Group customers contact details and booking history in one place. Send out automated reminder texts and emails, thank-you notes and special offers.

Keep track of your calendar.

Integrates easily with your current calendar so you never worry about double-booking or losing a booking. Receive booking notifications and check your schedule and your employees' from your mobile.



Pocket Office: Built for small business.



Data and performance.

See who's following you on social or visiting your listing. Get a snapshot of your appointments and history,

including no-shows. Pop our smart widget on your site for insights on who's clicking and buying. Then use this data to shape your email marketing communications.

Put your stamp on it.

Make our templates your own. You can put your branding on all our tech so customers can instantly recognise your business.



CRM success stories.

Here are some examples of businesses that have used Pocket Office to build strong customer relationships and drive results.

Riverton Physio Clinic.

With an extensive client base going back 23 years, Riverton Physio Clinic saw the need to consolidate paper-based client data into an online booking system to more effectively manage appointments and provide a better customer experience. Business owner Craig Hewson says he's already received positive customer feedback since making the switch to Pocket Office:

"Pocket Office's online booking and reminder system is excellent. It helped me move from using a diary to an online system for managing my clients and appointments."



"My customers appreciate the reminders for the appointments. The support team has been fantastic in their response every time I've contacted them via email, phone or chat."

Roy Matani Beauty and Massage.

Roy Matani Beauty and Massage offers in-home beauty and massage services to customers in and around Cranbourne in Victoria. Knowing that her customers

appreciate flexibility, Sophie Nguyen moved to Pocket Office to allow online bookings and payments – features she says her clients love:

"My clients love Pocket Office. They love the idea of paying and scheduling online. Once you're up and running, it's very easy to use. Pocket Office has made it a lot easier to manage my business and the customer support is fantastic!"



Wrapping up.



Thanks to the range of sophisticated, user-friendly CRM platforms out there, it's now much easier for small businesses to develop and maintain their own CRM.

The benefits are multiple, allowing you to reach out to, and nurture existing customers and turn prospects into conversions with targeted messaging and special offers. And thanks to CRM analytics, you can also get key insights

into how you're tracking at the click of a button and adjust your strategy accordingly. Now that you've got the basics of CRM down pat, it's time to choose a dedicated CRM platform and start driving results for your business!

Pocket Office – designed for small business.

Pocket Office is a great value CRM option with a complete

suite of tools designed for small business. This includes email marketing, invoicing and bookings functions. With all this under the one roof, you can quickly and easily get a complete view of your customer interactions and then use this info to better understand your market and when and how to talk to them.

From just \$20[^] a month.

That's a total of **\$240 per year** to connect with your clients, improve conversion, streamline processes and ultimately grow your business.

For more details on how Pocket Office can work for your business, our expert team are here to help. Just get in touch on **13 24 89** or [click through](#) for details.

[^]With a Yellow product.