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The CRM Buyer's Guide for Manufacturing

Align sales, marketing, service and dealer networks to provide the ultimate manufacturing customer experience

Introduction

Life in the manufacturing sector has always been a challenge, but the past few years have put particular strain on companies to deliver. Supply chains have been fractured, critical skills gaps widen, and customers are more discerning than ever before. With so many moving parts in your business, the last thing you need is a complex and unwieldy sales, marketing, and service apparatus to keep your customer base thriving.

Simply creating great products is no longer sufficient in today's manufacturing environment. Today's leaders must recognise the importance of creating compelling customer experiences, building quality relationships with dealers and partners, and providing simple, time-saving functionality that offers real value to end-users. Customer relationship management (CRM) solutions can be valuable for manufacturing companies who wish to stay competitive, reduce costs, and eliminate operational complexity. It's all about shaping a dynamic yet pragmatic customer experience. That's the key driver to success in a digital, data-driven world.

Connecting the Dots with Data

Manufacturing companies fundamentally have a broad and deep scope of activity to create, sell, deliver, and service products for their customers. When stakeholders don't even know how others in the organisation interact with customers, it creates wildly inconsistent customer experiences that make companies look disconnected and unfocused.

A sales rep trying to close a big renewal but is unaware of a serious service issue, for example, may unintentionally harm the customer relationship. Similarly, marketers who don't clearly understand what supplier or service opportunities are in play may market the wrong messages or irrelevant content to a busy customer.

The key is connecting the dots—and the data. By linking disparate data sources across the business, each stakeholder gets a fresh, comprehensive view of all customer activities tailored to their role and preferences. The insights gleaned from the 360-degree view help organisations move from reactive to proactive to deliver great experiences for every customer interaction.

How Teams Get the Data They Need

Sales, marketing, service, dealers, and partners all get a unique view of data they need, enabling them to:

- Surface relevant issues for each opportunity, such as historical pricing, backorders, availability, and customer interactions
- Drill down granularly on account details with contextual dashboards and reports

- Create account scoring to get a flavour of what's important at every touchpoint and what next interactions will be most impactful
- Link to external solutions such as LinkedIn to understand their networks and scour media sources to unearth news activity for an account

Manufacturing CRM Should Be Easy to Use, Easy to Adopt

It's unfortunate that those who stand to benefit most from a CRM system either can't or won't use it because it's overly complex and user-unfriendly. Especially for manufacturing companies with many processes to monitor, CRM must be a practical application that provides real value. It doesn't have to be flashy, but the connected workflows should optimise every key interaction, following alerts and dashboard cues to drive issues to resolution. Users should interact with the system flawlessly with no tech training. In other words, they should want to use it, not be forced to use it.

The right manufacturing CRM makes it easy to access what you need, when you need it:

🔍 Getting at-a-glance insights on the latest customer purchase or service ticket

💬 Communicating with channel partners

📦 Seeing where orders stand within the supply chain.
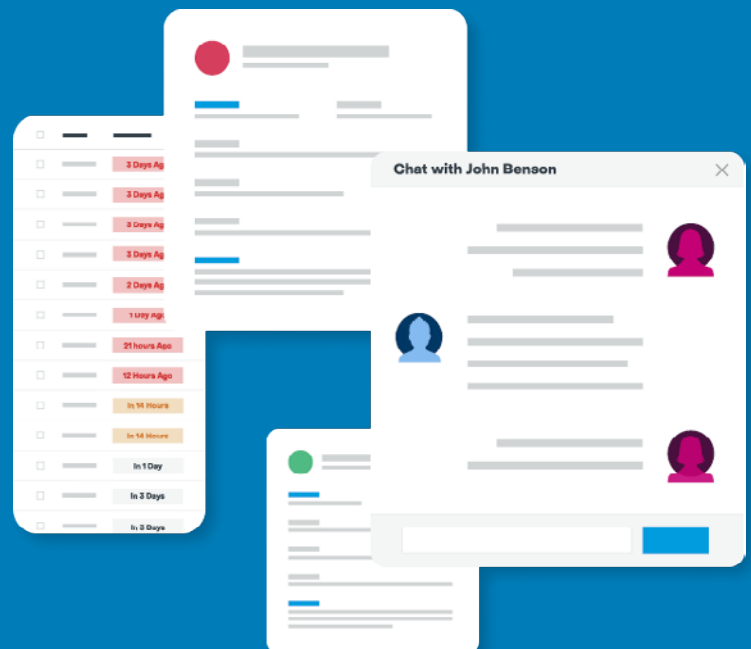
When done right, you can turn every employee into a customer expert by putting the right information at their fingertips, often before they even ask for it.

It should be easy to "own the UI," customising user views to accommodate each individual's unique characteristics without adding complexity to the system. You decide upfront how users will interact with the system, creating distinct user types and allowing them to see only the information that's relevant to them. Insights should be delivered visually wherever possible to help users conceptualise information and act decisively. And the intuitive interface must extend across desktop and mobile devices, so that field agents and mobile workers get the same experience regardless of device or location.

CRM should provide:

- Drag and drop configurations that users or a local admin can customise

- Fast access to the SDK, so it's easy to stylise the system for your organisation and your brand.

- Easy integration with ERP and MRP systems, with unlimited API calls

Key CRM Workflows for Manufacturing

Demand Forecasting

In an optimally designed value chain, information must flow in both directions. While manufacturing needs to provide the right products in the right quantities for sales, it is equally important for sales to forecast and inform manufacturing operations which products need to be manufactured, in what amounts, and by when. The timing and accuracy of demand forecast data form the cornerstone for optimising inventories, raw materials, and supply chain workflows.

> **The people who have the best perspective on demand (dealers and territory managers) are often furthest from the supply side of the equation.**

The people who have the best perspective on demand (dealers and territory managers) are often furthest from the supply side of the equation. Sales-driven demand forecasting draws data from the front line and delivers it to finance and the supply chain, helping to:

- Forecast sales demand based on real numbers instead of guesswork or extensive research
- Order just the right amounts of raw materials and know precisely where to focus future production
- Reduce back orders and waste, speed turnaround times, and respond quickly to changes
- Create dealer-estimated order volumes and pipeline progress, all in real time
- Understand what sized bench the sales team will need to satisfy orders
- Improve trust that sales teams have in the CRM system accurate forecasting

Empowering More Proactive Sales Teams

Sales teams are constantly on the go, interacting at every turn with customers and prospects to drive revenue. And yet, they can be limited if they cannot gain instant access to customer data that impacts their pipeline. Many rely on emails and undocumented conversations to stay in the loop. Modern CRM systems transform your sales team from reactive transaction agents to proactive relationship managers, enabling them to:

- Anticipate and track territory analysis and coverage, customer orders, defects and returns, purchasing trends, and leading demand indicators
- Monitor ongoing cash flow to better understand what stage a deal is in and when products and services will be delivered
- Ensure approval workflows such as expenses for client visits and discounts offered
- Accelerate call prep time with deeper customer information, including social media sources
- Utilise the critical mobile components of sales on the go, including merging documents and checklists into mobile, verifying the location of contacts, and accessing each opportunity`s updated data.

Streamlining Field Sales and Service and Dealer Network Activity

Manufacturing companies often rely heavily on their dealer networks, field sales, and service teams, and relationship management is key to their business. It's less about tracking tasks and supplies at the SKU level and more about optimising dealer and field time to keep relationships strong. Teams out in the field don't want complexity, just the right amount of relationship intelligence to get the job done. CRM systems can help central ops and field groups:

- Measure dealer performance, identify gaps, align dealer planning, forecasting, targets, and mutual accountability
- Collect and share territory data to maximise pipeline and sharpen account priorities
- Ensure dealers are current with local marketing, product trends, promotions, and fulfillment projections
- Collaborate on joint plans, growth targets, opportunities, barriers, and incentives
- Easily add new dealers to the network, see where opportunities are and needed support

How Marketing and Service Impact CRM Success

You can't fully tell the whole manufacturing CRM story without marketing and service activity in context with each customer and account. As the first point of contact with customers, marketing must share everything they know with sales and service: what an account or prospect has downloaded or which website they visited, promotions, product recommendations, webinars attended, and other marketing activities. These touchpoints create a buyer persona that starts the journey and provides an initial roadmap for sales and service to follow. How a customer engages your marketing team will provide important indicators for future interaction.

Service and support are also critical touchpoints, and their alignment with sales and the rest of the organisation is vital for keeping manufacturing and supply chain businesses operating optimally. Sales and service run more effectively when the CRM system utilises a business rules engine and advanced workflow to enable seamless handoffs and smart escalations, such as routing calls to in-house product experts outside the support centre. Similarly, to achieve SLA compliance, the resolution of the entire service lifecycle must be visible to multiple stakeholders. The system can send alerts whenever threshold values for action are exceeded or unmet, and high-priority issues can be dealt with on time.

Additional manufacturing processes that can be optimised include:

- **Contract Management:** Speed up time-to-close and automate contract creation and management
- **Order Management:** Automate workflow in the post-sale process and ensure orders are fulfilled, billed, and paid
- **Service Delivery:** Automate the process around post-sale delivery and installation
- **Claims Processing:** Manage the tracking of customer claims, returns, and refunds, integrated with financial systems
- **Purchase Requests:** Enable intelligent purchase order creation, ensure timely alerts, and enforce parameters around purchasing activities

CRM Optimisation Drives:

- Pipeline visibility to enable sales teams to identify new opportunities
- Improved conversion rates across all defined sales stages to establish baselines on which to benchmark success, including sales, upsells, and cross-sells
- New business growth by tracking new accounts or net new sales by a customer
- Retention and profit per customer to drive better lifetime customer value
- Granular sales performance, including average sales cycle and conversion rates by rep
- SLA compliance with customer service level commitments

- Customer satisfaction, customer sentiment/advocacy scoring, and attrition rates
- Faster service resolution time with higher satisfaction
- Automated campaign management and lead scoring to reduce manual processes
- Simpler and more inclusive IT workflow automation to optimise customer experience
- Full tracking of payments by the finance team, flagging accounts when payments missed

Conclusion

In an era where even large manufacturing companies must be agile to address shifting markets, stressed supply chains, and changing customer demands, the ability to provide a connected and compelling customer experience is of paramount importance. The right CRM solution can go a long way to satisfy the needs of every key customer–facing group, from marketing and sales to service teams, dealer networks, IT, finance, and the executive team. When all stakeholders work from the same playbook and within a fundamentally easy system, creating and maintaining that experience becomes a much simpler task.

Revolutionise Your CRM and Business

Learn what SugarCRM can unlock within your organisation.
A better solution is just a click away.

GET DEMO

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com/uk or follow **@SugarCRM**.

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