



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





# Introduction.



## What is CRM and why does it matter?

CRM, short for customer relationship management, refers to the strategies and tools you use to manage all your relationships and interactions with your customers and potential customers.

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

- ✓ Contact details
- ✓ Appointments
- ✓ Service history
- ✓ Invoices paid and unpaid

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

- ✓ Email marketing
- ✓ Appointment reminders
- ✓ Invoicing
- ✓ Social media

Businesses large and small use CRM platforms to compile customer data from various channels and points of contact, such as social media, your website, emails, live chat and so on. From here, a business can access detailed information on customers' personal information, purchase history, buying preferences and behaviours.

In other words, CRM gives businesses the ability to manage end-to-end 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.



# Contents.

## Section 1

**Components of a CRM platform.....4**

## Section 2

**You've created a customer database. Now what?.....5**

## Section 3

**Tips for choosing and implementing a CRM platform.....6**

## Section 4

**Customer retention strategies.....7**

## Section 5

**CRM software features.....8**

## Section 6

**Wrapping up.....9**





# 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 - often in real time and across multiple channels.

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 automate marketing efforts. For example, a new prospect being entered into the database might trigger an automatic welcome email or other marketing materials.



## Customer self-service.

CRM platforms with self-service capabilities allow customers to schedule appointments, make payments, register for events, etc.



## Location-based services.

Some CRM platforms include technology that can create geographic marketing campaigns based on customers' physical locations, and some can integrate with popular location-based GPS apps. Geolocation technology can also be used as a networking or contact management tool to find sales prospects based on a location.



## Lead management.

Prospective customers can be tracked through CRM platforms, enabling sales teams to input, track and analyse data for leads all in one place.



## Workflow automation.

CRM platforms can help businesses reduce manual admin by automating repetitive tasks like follow-ups, reminders and even AI-assisted scheduling, enabling employees to focus on more high-level needs.



## Analytics.

Analytics and reporting tools in CRM platforms help drive better customer satisfaction rates and more effective marketing efforts by generating insights based on customer and campaign data.



## Predictive tools and automation.

Modern CRM platforms often include predictive features and automation. These tools can identify sales opportunities, trigger timely messages and suggest actions based on customer behaviour. This helps save time and improve customer engagement.



## First-party data.

First-party data refers to the information your business collects directly through customer interactions — such as website visits, purchase history, forms and email engagement. Unlike third-party data, this information is highly accurate and relevant to your customer base. CRM platforms help store and manage this data to support more personalised marketing and better decision-making.



## Privacy and consent.

Customers expect transparency about how their data is used. CRM platforms should help you manage consent and communication preferences in line with current privacy regulations. Responsible data collection builds trust and protects your business.



# 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 treasure trove of 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 to ensure a faster return on your investment:



## One. Have clear goals.

It's critical to understand your business' needs and goals before evaluating the options out there. 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 quantifiable goals you'd like to hit.



## Two. 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 feedback 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 makes sense to choose a CRM with self-service booking capabilities.



## Three. 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 like appointment scheduling, follow-up messages and customer onboarding, helping cut down on manual admin. Make sure that the system you choose has the capability to help you work smarter rather than adding to your already long to-do list.



## Four. 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 add-ons.



## Five. Offer training and support.

Customer relationship management is more than just learning a new piece of software; it's a business philosophy based on a customer-first approach and continuous improvement.

When rolling out a CRM platform to your team, it's not only important to provide training on the ins and outs of the system, but also to communicate the reasons behind the new processes and offer ongoing support in adopting new ways of working.



# Customer retention strategies.

A reliable CRM platform provides a solid foundation for building long-term customer partnerships.

Here's how you can use CRM software to 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 meetings, calls or emails. Booking and keeping appointments shows that you value your customers and gives you the opportunity to convert prospects into loyal customers.



## Personalise your communications.

CRM software helps make it easier to see your customers as people rather than numbers. With access to preferences, behaviour and past interactions, it's easier to personalise messaging and adjust outreach strategies to increase relevance.



## Zero-party data.

Zero-party data is information that customers voluntarily share, such as preferences or future intentions. Adding this data to your CRM gives you deeper insight into what your customers want, helping you create more tailored experiences.





# CRM software features.

CRM software can vary greatly but there are a number of helpful features that you can expect from most systems.

## **Omnichannel and mobile access.**

Customers interact with your business across multiple channels — from social media to SMS. A good CRM tracks these interactions and gives your team access from anywhere. Mobile-friendly CRMs also allow you to manage your business on the go.

## **Customer contact details.**

CRM systems automatically (and safely) record any customer who gets in touch online. This captures their details for potential future use (if they agree to that).

## **Stay in touch with your customers.**

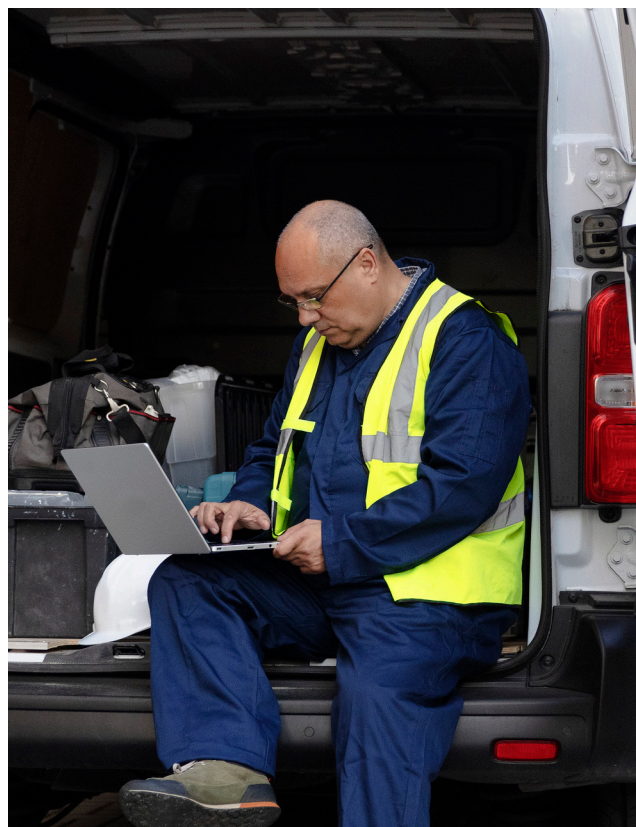
Group customers' contact details and booking history in one place. Send out automated reminder texts and emails, thank-you notes and special offers.

## **Keep track of your calendar.**

Never worry about double-booking or losing a booking. Receive booking notifications and check your schedule and your employees' schedule from your mobile.

## **Book, invoice and schedule 24/7.**

Allow customers to book around the clock. With a few quick taps they can schedule appointments, make payments and even register for events.



## **Find out how you're tracking.**

See who's following you on social or visiting your listing. Get a snapshot of your appointments and history, including no-shows.

## **Data and performance.**

Some CRM systems offer a smart widget on your site for insights on who's clicking and buying. You can use this data to make better business decisions.

## **Your bookings button everywhere.**

From your website to Facebook, you can add a booking button across the internet, so customers can book from any place where they've found your business.





## Wrapping up.



Nailing your CRM strategy has never been easier thanks to the range of sophisticated and user-friendly CRM platforms out there.

With a treasure trove of customer data at your fingertips, you can easily reach out to and nurture existing customers and turn prospects into conversions with targeted messaging and special offers.

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.

### **And before you go...**

Looking for a tool to help you manage your customer relationships and business from end to end? Check out Thryv.

**The CRM software made for small businesses**