

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Jun. 01, 2007

To experience customer service off the charts you need only to visit Connecticut-based Mitchells and Richards clothing store ([www.mitchellsonline.com](http://www.mitchellsonline.com)) where CEO Jack Mitchell promises services “Over the Top.”

For customers, this has meant a Sales Associate providing the coat off their back if it was needed for a trip; or a house call to help with a bowtie for an important event. Mitchell calls it a “people matter” atmosphere, and the stores achieve it best by really “knowing the customer.” Mitchells/Richards keeps all the customer data in a database, tracking everything from clothing tastes and sizes to nicknames, family members, favorite foods and birthdays. Some information comes from the sales receipt when they buy another pair of pants; the more personal information comes from just regular customer interaction. The result is a profile, and, when those customers come in or call, the Sales Associate has a resource to prep them for providing that “over the top” service.

So think about it. Would it help your business if you knew the brand preferences of all your clients? How about knowing in advance your chances of selling everything your vendor just offered at end-of-the-quarter special pricing?

Jack Mitchell knows the answer to both. It comes from his CRM system. He knows what his customers buy, so he knows just what he should be buying from his suppliers. You might say he's taken that customer service thing to an extreme, but he got there because he and his team members THINK CRM.

You might not use these exact terms, but you might already be practicing Customer Relationship Management (CRM) in your business. In its broadest sense, CRM is a concept used by companies to manage their relationships with customers, driven by a process to capture, store and analyze customer information, or so says Wikipedia. Or CRM is an information industry term for methodologies, software and usually

Internet capabilities that help an enterprise manage customer relationships in an

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Numerous publishers of CRM products would hope you'd think of them when you think CRM: ACT!, GoldMine, Microsoft CRM, SageCRM, Salesforce.com, SalesLogix, Siebel, Pivotal, and more. I have a different take. Those are the tools for using CRM, but I believe CRM is not a tool, but an attitude. "All good customer service is a result of nifty systems," says Charlie the Fairy Godmother in Ken Blanchard's "Raving Fans," suggesting that true CRM is a result of attitude and tools working in unison.

On the Alabama coast, a reseller of boats recently used its new ACT! CRM to e-mail customers about a special on boat engines. Over the next two days, they sold eight of them. It worked so well they wished they had done it sooner. The fact is it worked so well only because they knew the interests of the customers, and by now drawing from the database they had a way to see that and act on it.

So think about it. Would it help your business, or your client's business, if you knew the preferred method of communication with your different customers? It could be the difference between your customer seeing your note or being deleted as junk mail because they pay more attention when it comes via U.S. Mail. Or it means saving your postage because some customers prefer e-mail. Playing to your customer is as easy as tracking that "preferred method of communication" in your database. All you have to do is THINK CRM, and you can improve your odds of "closing a sale" by focusing your marketing on promoting the right product to the right customer using the right delivery method.

Consider also the case of the consulting services company that started to THINK CRM as they analyzed their own client base and discovered they could not track by industry. They contracted with a service to assign the correct SIC codes to all their clients and prospects and then imported the information into their CRM database. The reports were enlightening: Their clients may have come in many sizes, but a large number fell into four distinct industry niches. It was a short leap from there to

develop the marketing materials that reinforced their ability to deliver to other

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Step back, and see if you can THINK CRM for your sales process when it gives your team members the opportunity to know in advance if your prospect or client is worth their time. That might come when you integrate information from your accounting to your CRM so team members know if your customers are good credit risks. That stops the sale to the company that still hasn't paid you for the last sale. Or it fuels the sale if you could directly target a new financing option to only those customers that need payment plans.

It sounds great, but it must be expensive, right? Not necessarily. That's because you may not need a full CRM system to begin to achieve results. In fact, you likely already own enough to get started.

At a very basic level, the Microsoft Outlook you use everyday already has fields for entering titles, departments, birthdays and opportunities for adding more through user-defined fields. The key is to get into the THINK CRM mindset and be diligent about capturing information. Have you documented the contact information for all the people you need to touch at your customers? Do you have that same information on upper management and owners? Do you have industry information if that is important?

If you THINK CRM, you can use this information to find and sort contacts by demographic criteria, send a thank you gift for a client referral or identify and invite all your contacts that work in sales to a seminar specific for their needs.

For the time being, just focus on trying to THINK CRM. The core of any great business is the customer. If you THINK CRM to accumulate and analyze customer-centric information, you will serve your business better and improve the bottom line for you and your customers.

---

# In Print & on the Web

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved