

Implementing a CRM Solution?

Here are some CRM Best Practices to help you thrive in the post-COVID era



Customer Relationship Management (CRM) solutions like Salesforce help break siloed data between departments to give companies a complete view of their customer interactions with their brand. Using a CRM solution, employees across marketing, sales, commerce, service, and IT departments can share a single customer view with any device regardless of location. This gives companies a deeper understanding of their customers and also creates a better experience for customers when interacting with the company.

For your CRM implementation to be successful, your company needs to focus on these best practices:



Select a CRM that best suits your needs

Not all CRM solutions are the same. Researching which CRM solution is best for your company can be the first step. Do you prefer cloud-based operations or do you want one that is located on-site? Does your company need an in-depth, customizable feature, or is a basic one enough? Take your time to weigh every option available before making a final decision.

Put in some time training your workforce

If your company cannot fully utilize your CRM, then it will be just another expensive filing system. When acquiring a CRM solution, focus on helping your employees understand the entire software and how to take advantage of its features.



Rely on automation

CRM solutions can help your business to grow by doing most of the heavy workload when it comes to customer relationships. This means that the majority of the work associated with data entry can be automated. Automation will decrease the chances of errors sneaking into your system and will also free up your employees from wasting time on these types of repetitive tasks.

Emphasize collaboration

CRM solutions, compared to traditional systems, improves cooperative efforts. CRM makes all information accessible throughout your organization, which can help lessen confusion and break barriers of siloed data. This will enable your employees to have a continuity of service with customers since all data can be accessed by your team.



Keep it simple

The complexities of CRM options can be overwhelming. Do not go out of your way to invest in CRM features that you think will not benefit your organization. Choose something that is simple yet effective.



Before transitioning your business to a CRM solution, make sure that there is a solid foundation of data protection for your business.

With the help of [dotSolved](#) CRM experts, transitioning should not be a problem.

dotSolved helps small, medium, and enterprise organizations streamline their customer experience delivery. The dedicated consulting team at **dotSolved** brings more than a decade of experience with Salesforce CRM to help you with:



Business Process Transformation



Managed Services



Cloud Migration Strategy



Staff Augmentation



Implementation and Upgrade



Force.com Development

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