Choosing the Right CRM for the Manufacturing Industry

Content

Introduction

We're here to help you determine how to successfully select and deploy a CRM solution to support your manufacturing organisation.

Manufacturers run complex operations involving an intricate web of clients and suppliers.

This creates challenges for ensuring everything is up-to-date, organised, and consistent — and aligned across all departments and teams.

To keep business flowing smoothly, manufacturers turn to software like Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM).

CRM is extremely valuable for creating a single view of your customers. This single view — spanning first contact to ongoing service and support — provides benefits both within your business and to the customers you engage with.

CRM empowers manufacturing teams with greater efficiency and analytics for fresh business insights needed to streamline production, delivery, and inventory. Meanwhile, customers and prospects receive a superior experience — key to your business's ongoing success.

But to acquire these internal and external benefits, you'll need to do more than spend on new software. Successful CRM projects depend on people, processes and technology working in unison. Indeed, according to Forrester Research, **70 percent of failed CRM projects flounder due to lack of adoption.**

CRM and ERP: Two Interlocking Puzzle Pieces

Many manufacturers rely on Enterprise Resource Planning (ERP) software for inventory, delivery, financials, and procurement. Because ERP is so critical to the business, it's tempting to see it as a one-stop solution for managing customer relationships as well as resources.

But most ERP's 'CRM' functionality provides only integration with Outlook or Excel spreadsheets. Your ERP is extremely valuable, but it's really not appropriate for Customer Relationship Management.

Think of CRM as the system to manage the front-office information — in contrast to an ERP which handles the back office. They're separate but interlocking puzzle pieces.

CRM solutions with Sales, Customer Service, and Marketing functionality provide the tools needed to collect and manage details about your interactions with suppliers, customers, partners, distributors, and more. Based on information stored in your CRM system, you're able to provide exceptional service to your prospects and customers.

Employees gain the capacity to visualise your sales pipeline, automate processes, track and manage support tickets, run marketing campaigns, and perform numerous other daily business tasks — all through your CRM.

Determine Your Core Needs

When selecting a CRM solution, consider how it will integrate with your existing ERP systems such as SAP, Sage 200, and Epicor.

You enter a shoe shop looking for footwear suited to your needs: running shoes for jogging, slippers for relaxing at home, and dress shoes for formal occasions. You pick the best option from the choices available and ask for a size that fits.

The process is similar for choosing a CRM solution: it works best when you start by evaluating solutions designed for your processes and sized for your budget, applications, timeline, and ROI target.

Begin with introspection. Gather the needs of each department and query employees on what they need to do and what can be improved. Armed with the right information, you'll avoid buying software with expensive "bells and whistles" your team simply won't use, or a generic CRM that requires elaborate (and costly) setup to match your manufacturing-specific workflows.

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With your requirements list in hand, you can select a CRM solution scaled to your needs. As you'll see below, Maximizer CRM for Manufacturing ticks off each box on a typical CRM checklist.

CRM
Checklist

Features

✓ **All-inclusive design:** An all-inclusive solution provides affordable CRM coverage across your organisation. This saves money and empowers your teams with a full range of customer information at their fingertips.

Just look at how full CRM coverage benefits sales: your salespeople can bring up service details in follow-up calls, impressing customers and identifying new up- and cross-sale opportunities.

Maximizer CRM comes pre-built with modules for sales, marketing, customer service, and analytics, at a lower total cost than most solutions made up of individual modules.

✓ **Mobile-enabled:** Field service excellence requires a mobile-enabled CRM. This ensures remote agents and technicians can reschedule appointments on the fly and fetch critical information wherever they are — including product manuals, technical papers, SLAs, and other forms.

✓ **Beat your competitors with Quick Quotes to win the deal**: The first company able to deliver a detailed quote after talking with a prospect is more likely to close the sale.

By incorporating Avrion's Maximizer Quotes solution, you can empower your salespeople to quickly deliver proposals derived from a built-in product catalogue. Create and send accurate quotes in seconds and beat your competitors to close the deal.

✓ **Cloud and on-premise options:** Cloud-based Maximizer CRM possesses the same customisability as the on-premise solution and comes with free and automatic updates, unlimited live support, 24/7 mobile access, and the security of knowing your data is protected in Tier IV certified data centres.

CRM
Checklist

Customisation

✓ **In-house customisation:** Many manufacturers adjust their CRM solution to fit their unique way of doing business by building custom forms, workflows, and features. However, customisation can be prohibitively expensive due to the high cost of specialised third-party consultants.

At Avrion, we take the pain away from this process by offering in-house customisation expertise. Our professional services team works closely with you to understand your specific needs and tailor Maximizer CRM to match your business processes. This includes building custom forms, workflows, and features that align perfectly with your operations. By handling the customisation in-house, we provide these services at very cost-effective rates, ensuring you get a solution that fits without breaking the bank.

✓ **ERP/CRM integration:** Many manufacturers need to integrate their back- and front-offices to ensure order information circulates properly throughout their organisation.

Avrion specialises in seamless ERP and CRM integration, taking the complexity out of the process. Our professional services team ensures that your Maximizer CRM integrates smoothly with your ERP system, allowing front-line staff to easily access invoices, order lists, and sales information. This integration vastly improves the speed and accuracy of service and eliminates repetitive admin work like copying and pasting data between applications.

With Avrion handling the integration, you can focus on running your business while we ensure your systems work harmoniously together.

Training & Support

✓ **Training & Support:** On-going, multi-level training is integral for on-boarding new users, driving adoption and deepening expertise across the organisation.

User Training and Onboarding Process

Training & Support

Comprehensive Training and Support from Avrion

Avrion provides a detailed, tailored training and onboarding process to ensure high adoption rates of Maximizer CRM. Our training includes:

✓ **Initial Training Sessions:** Comprehensive training sessions for all users to get familiar with the system.

✓ **Live Customer Support:** Our comprehensive support is designed to cater for anything from helping a user create a dashboard, assisting with adding new users and creating new fields – through to speaking to your relationship manager and technical team about future phases and planning for evolution. We are very flexible with our approach to support and want to make sure everyone is always getting the most value from the solution.

By offering these training and support services, Avrion ensures your team can maximise the value from your CRM solution, leading to higher adoption rates and greater overall efficiency.

So Who Is Avrion?

Making digital transformation straightforward and achievable.

Our mission is to enable digital transformation, on your terms, with your business needs and budgets in mind – as a team working together. We want to improve your working processes with our expertise to make your business the best it can be.

A team of passionate technology professionals, with the core team working together since 2001, we work with you to create the best solutions for your business.

Our partnership approach takes advantage of your knowledge of your business plus our knowledge of solutions and connections to combine to create clever implementations that deliver high-value and measurable business improvements.

With CRM at the heart of most companies' digital transformation, Avrion always takes the next step after CRM to integrate other systems, automate functions and streamline businesses resulting in both cost and time savings thereby improving your bottom line.

Experience the benefits of a partner who prioritises your business goals and delivers high-value, impactful solutions.

Sam Walton

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Meet Restore plc

The Challenge

As Restore plc grew with multiple acquisitions, some extremely large, the company struggled with disparate databases, operational systems and finance systems, with separate management and sales teams in each division. Data was inconsistent and CRM usage was sporadic. The IT and Projects Teams were under-resourced and detailed business mapping was needed.

The Avrion Response

Restore plc decided to review several CRM systems with Avrion, but after the cost implications and complexity of changing to a big-name CRM, decided that money was better spent evolving the system in place, Maximizer CRM. Having kept the central CRM database at the heart of the company and imported data from each acquisition, Restore plc was in a good place to build from there. Avrion provided a very detailed and cost-effective solution to meet the requirements of all divisions of Restore plc with an iterative approach of continuous improvements, whilst maintaining support and use of the existing system. There were no disruptions to the 200+ users. The Data Warehouse approach was agreed early on and, from there, a heavy gathering of requirements across the group was managed by Avrion, which led to positive engagement from all parts of the business. This helped the project progress enormously.

Meet Restore plc cont.

Working Together

Avrion had worked with Restore plc for over eight years, being the CRM provider for a small scanning company that Restore acquired early on. Commercial Director, David English, decided to stick with Maximizer CRM as it provided a simple CRM system at cost-effective prices that could evolve. The huge growth of the company meant Avrion helped Restore plc's CRM grow from a 5-user system to over 200 users. The relationship was, and continues to be, open and supportive, and our knowledge of how Restore works as a group is extensive. This knowledge made Avrion well-placed to make decisions about the data and to present it in the best possible way. Within each element of the project, Avrion was involved in the demonstrations and training with both management and users.

WATCH HERE

The Results

The result of the extensive improvements in Maximizer CRM means that data is now more complete. The Data Warehouse connecting financial and operational systems to the CRM system presents users with data in one place; it's simple and it saves time. The introduction of Introhive in the project also arms the Sales, Finance and Account Managers with unique insights of connections to prospects and customers within the group.

With all the systems linking together plus improved reporting, the Sales teams are able to see more opportunities for group sales, and managers can get a fuller, more accurate picture of the sales pipeline.

✓ Boosted sales pipeline accuracy and effectiveness, increasing cross-selling across 5 business units by **4x.**

✓ Holistic customer data reduced internal admin by **hundreds** of days.

✓ Enhanced data quality increased opportunities by **20%.**

✓ **Improved GDPR compliance** with better opt-out and contact preference processes.

✓ Streamlined quoting and contract processes **saved hundreds of hours** and delivered exceptional customer service.

Preparing for Deployment and Adoption

Ensuring Successful CRM Adoption with Avrion

Successful CRM implementation depends as much on your people as it does on the solution you're buying. That's where your "Adoption Team" comes in. Made up of CRM champions from different departments, these people spearhead your education and outreach efforts.

Tips for Company-Wide Adoption

- **Get Employees Invested from the Start:** Have your adoption team ensure all stakeholders support your decision by canvassing different departments before you commit. You'll need to articulate a clear, consistent vision of how CRM makes their job easier to get them on board.

- **Tailor the Platform to Mimic Your Processes:** Sometimes users don't adopt a solution because its jargon and workflows don't align with your unique way of doing business. Customisation and configuration can organise your CRM system with familiar workflows and terminology — shortening the learning curve.

- **Make Your CRM the Centre of the Universe:** Integrate and centralise your customer information into one place, so all stakeholders find information where they need it — in your CRM. This helps streamline your sales processes, encourages adoption, and simplifies training.

Integration Capabilities

Seamless Integration with Existing Systems

Many manufacturers need to integrate their back- and front-offices to ensure order information circulates properly throughout their organisation.

Avrion specialises in integrating Maximizer CRM with ERP systems and other business applications.

- **ERP Integration:** Connect Maximizer CRM with your ERP system to ensure seamless data flow and improved efficiency.

- **Supply Chain Management:** Integrate with supply chain management software to enhance visibility and control over your operations.

- **Other Business Applications:** Ensure that Maximizer CRM works harmoniously with your existing tools and systems, eliminating data silos and improving productivity.

By facilitating these integrations, Avrion ensures that Maximizer CRM becomes a central hub for all your business operations.

Happy Avrion Customers

Hear from Our Satisfied Customers

Here are some testimonials from manufacturing clients who have successfully implemented Maximizer CRM with Avrion's help:

Luke Hogg

"Working with Avrion has been amazing from start to finish. We use Maximizer as a main system, however we required a bespoke quote tool building for our sales team. From start to finish, the integration of the software and support has been nothing short of phenomenal. Their entire team are very knowledgeable, efficient and nothing is ever too much."

Craig Sansom

"We can now see in real time how all of our opportunities are progressing. We also have automated reports in our Dashboard module showing the business sales performance and pipeline, which allows us to focus on each individual opportunity without any being left unnurtured. Avrion has now linked our CRM with Mailchimp to allow for focused marketing campaigns based on the data we add to the Address Book. We now have a clear sales process that can be tracked with clear 'what's next' actions to implement."

FAQs (Frequently Asked Questions)

Common Questions About Maximizer CRM and Avrion

- **What is Maximizer CRM?** Maximizer CRM is a comprehensive customer relationship management software designed to help businesses manage customer data, sales processes, and marketing efforts.

- **How does Avrion help with the implementation of Maximizer CRM?** Avrion provides end-to-end services, including configuration, integration, training, and comprehensive ongoing support, to ensure successful implementation and adoption.

- **Can Maximizer CRM integrate with our existing systems?** Yes, Avrion specialises in integrating Maximizer CRM with ERP systems such as SAP, Sage 200, Epicor, supply chain management software, and other business applications.

- **What kind of support does Avrion offer?** Avrion offers comprehensive support, including live customer support, weekly webinars, detailed user guides, and online resources.

Product Roadmap and Future Enhancements

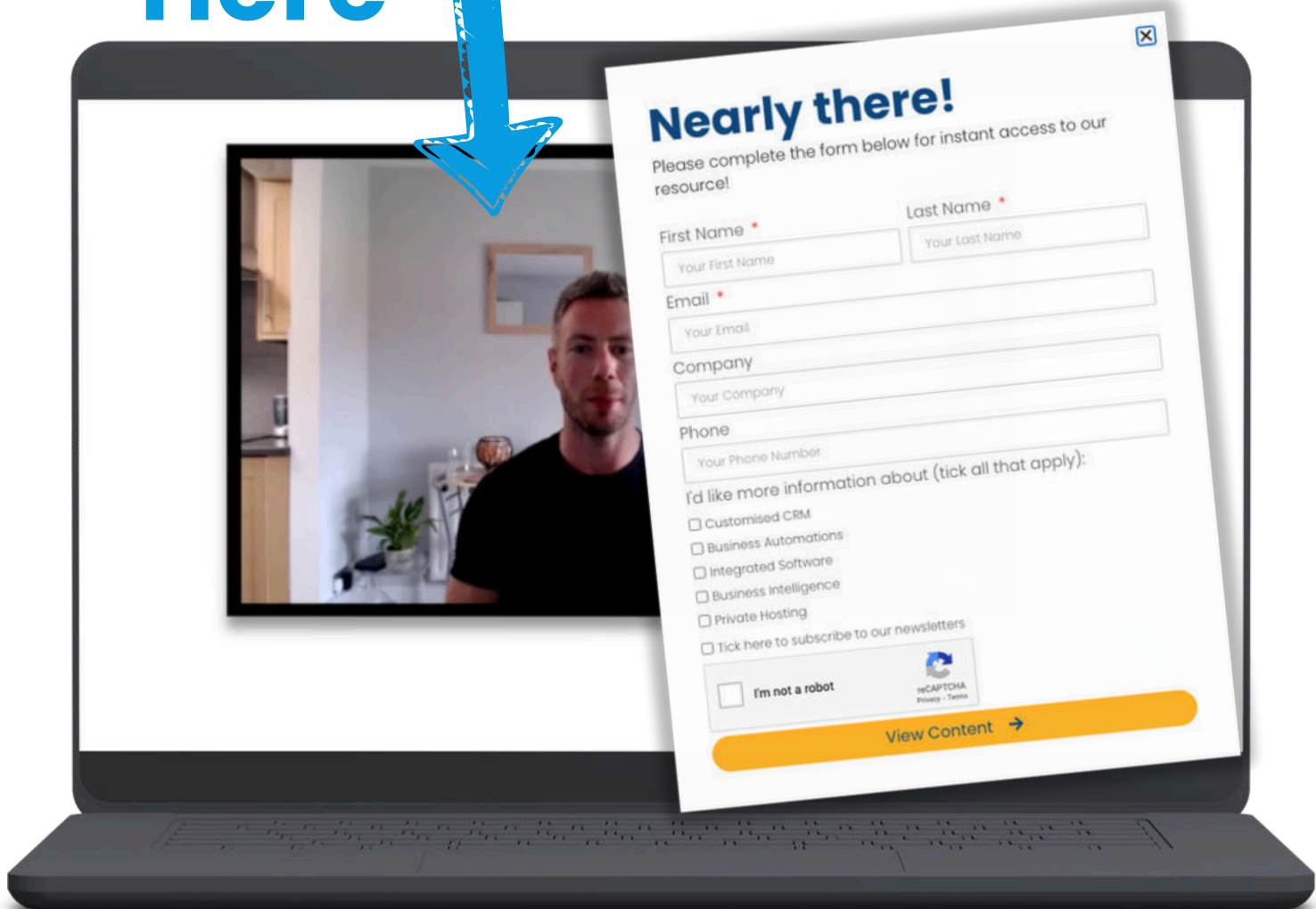## Staying Ahead with Maximizer CRM

Maximizer CRM is continually evolving to meet the needs of businesses. Here are some upcoming features and enhancements:

- **Enhanced Analytics:** Improved analytics tools to provide deeper insights into your business performance.

- **AI-Powered Features:** Integration of artificial intelligence to automate tasks and provide smarter recommendations.

- **Mobile App Enhancements:** Updates to the mobile app to enhance usability and functionality for your workforce in the field.

- **New Integration Options:** Additional integration capabilities with popular business applications and tools.

Avrion stays ahead of these developments, ensuring that your Maximizer CRM takes advantage of the latest features.

Watch now: Maximizer Walkthrough

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It's Time to Take action

There is no one-size-fits-all CRM. To get the best solution for your organisation, it's important to determine your needs and select a system with the performance, functionality, and flexibility you actually require.

Maximizer CRM for Manufacturing provides an all-inclusive solution pre-configured for your process, the flexibility to configure yourself, plus full service and customisation support from Avrion — to create an experience your employees will love.

To learn more about Maximizer CRM for Manufacturing, contact Sam for a free 30-minute exploratory call and solution demonstration.

Digital Transformation
<u>on your terms</u>

Thank you for reading.

Sam Walton

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your operations?
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