

A Winning Combination... CRM & Document Management.

If you want to catch a criminal, the conventional wisdom is to “follow the money”. In business, however, if you want to understand your workflow, you must “follow the documents”.

A good part of any business process is defined by the document flow within the process. Because of this, it is often very desirable to integrate document management with your customer relationship management (CRM) software in order to fully automate customer-facing process workflow.

For example, a typical sales process can involve quite a number of documents. In addition to the communications between a salesperson and a prospective customer, these may include some or all of the following: call sheets, fact sheets, spec sheets, quotations, credit applications, orders, contracts, packing lists, invoices, and sales receipts. To automate everything but the document handling is to leave a good portion of the process unaddressed and does not take advantage of many of the more important benefits.

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RB Data Services is fully certified to sell and support Microsoft CRM, GoldMine Corporate/Premium/Enterprise Editions, and SalesLogix.



CRMTIPS!

By Rick Bellefond, President, RB Data Services - TIP #17

locked in email, documents, shared hard disks, file cabinets, etc?” **Document Management, when used with CRM**, can result in better cashflow (due to quicker handling of cash-critical documents) and improved service and responsiveness to customers. Without this kind of system in place it is typical that when an employee leaves a company that 70% of his knowledge walks out with him.

Combining the two also results in all documents relative to a given customer relationship being kept together and instantly available.

Lastly, using CRM and document management tools together is often the critical combination necessary to providing self-service portals for your customers. CRM manages the processes and the customer relationship and document management functions ensures that everything needed to service the customer is easily accessible and retrievable.

The beauty of CRM solutions is that they become key to scaling your business. Automating your key customer-oriented processes, and integrating other systems and documents into your CRM, invariably yields substantial benefits across your organization.

Grow Your Business Through Better Customer Relationship Management – Stay Informed!

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