

CRM Guide: Sales 4.0

Five steps to offer best customer experience



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Digital transformation is increasingly sidelining traditional sales structures, not only in B2C but also in B2B business. In the past, products and services could be placed relatively easily in response to customer demand. Nowadays, sales personnel are faced with two extreme factors: strong competition, and comprehensively informed and self-assured prospective customers.

In fact, according to a survey by Forrester¹, 68 percent of B2B buyers prefer to do their own research on the Internet rather than talking directly to a sales executive. A survey by Google and market research firm Millward Brown Digital found out that 71 percent start with a general online search. Nine out of ten B2B buyers gather targeted information online when looking to make a business purchase. By the time they actively contact the sales force, they have already made an average of 12 online searches, and around 57 percent of the decision-making process is done.² And the trend is rising. Why is that?

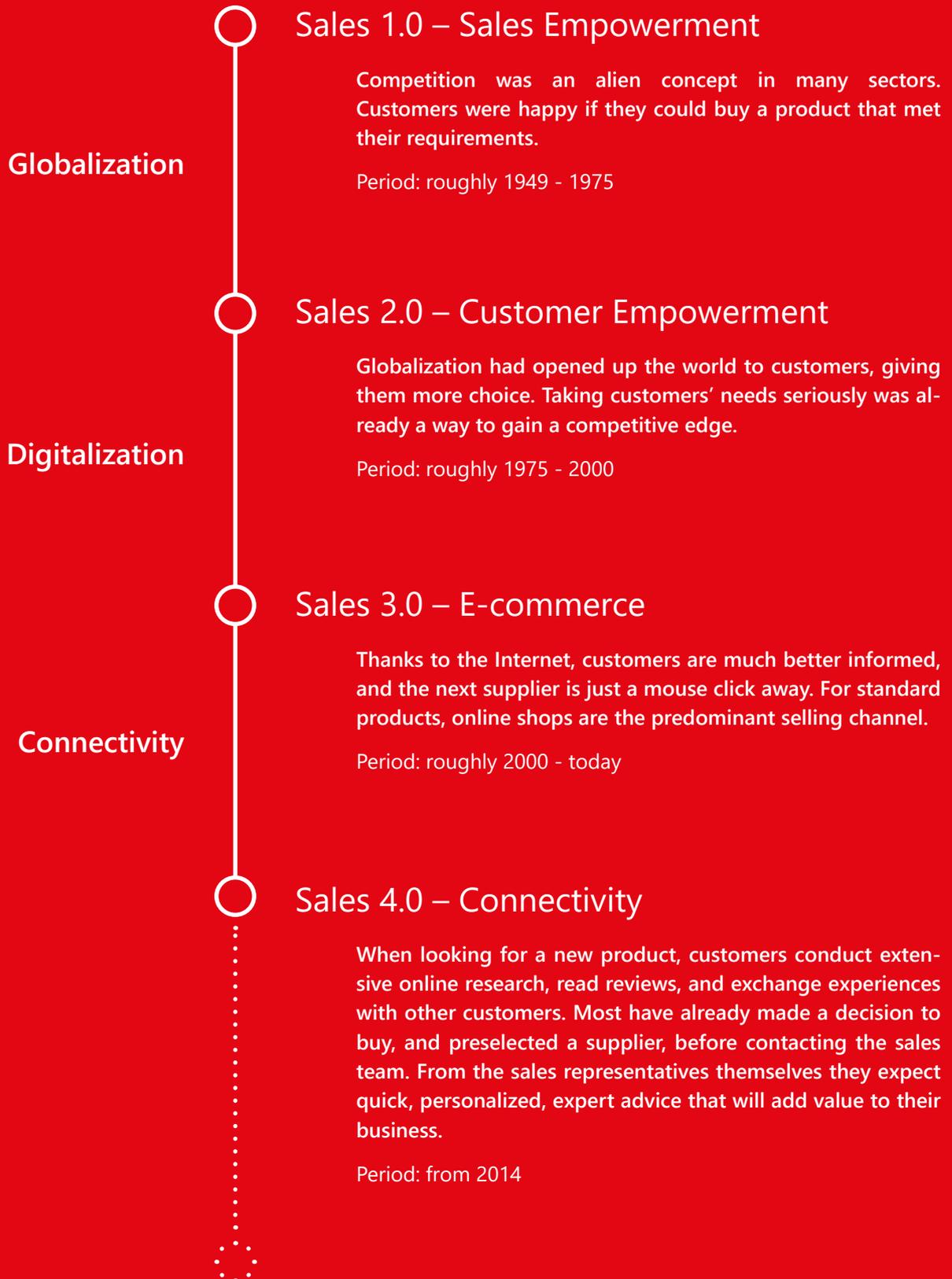
The Millennials are here

Ten years ago, professional buyers were still very evenly distributed in terms of age groups. For the past five years, however, the proportion from the so-called Millennial generation has been increasing. More than half of those who are thinking about business purchases are between 18 and 40, and have been familiar with the Internet for at least half their lives. The way they gather information and communicate is very different from that of previous generations. They prefer to google rather than browse through catalogs. They make contacts via Facebook, XING and LinkedIn. Thanks to smartphones, e-mail, WhatsApp and the like, they are able to exchange information on the move, are always reachable, ready to give a quick response. Almost half of all Germans are "always on". Forty-one percent no longer consciously think about being digital.³ They apply their experience with the convenience of online shopping to their professional buying behavior. Does that mean that personalized advice and selling are on the way out?

For almost 90% of Germans, personal contact is of a higher quality than a mere online relationship.

No, on the contrary. "Even though digitalization is becoming increasingly important, business is still done between human beings. It is the personal interaction that characterizes a customer relationship," says Marcus Bär, member of the management board of CAS CRM, a SmartCompany of CAS Software AG and expert in customer relationship management (CRM) in the SME sector. A survey by the German Digital Industry Association (BVDW) underscores the point. It revealed that almost 90 percent of Germans prefer personal contact to a mere online relationship.⁴ The expectations with regard to sales talks have grown and the traditional sales pitch has changed: Rather than a classic product presentation, professional buyers expect personalized advice. And that is where your skill as a salesperson comes into play. If you work with your customers in a solution-oriented rather than product-oriented way, positively surprising them with market and industry expertise, showing them new perspectives and business opportunities, you'll be a winner. You can do that by using digitalization to your advantage, by collecting and combining data in a targeted manner, and evaluating it for your work. So don't bury your head in the sand and hope that the Cloud and the rest of the online world will pass by like thunderclouds. Embrace transformation, and digitalize your customer relationship management.

Evolution in Sales



Five steps to Sales 4.0

In order to set up your digital customer relationship management successfully, we recommend that you take the following five steps:

- 1 Think of **Marketing and Sales** as a **single entity**, and create a unified customer acquisition and service team.
- 2 Change your attitude – away from thinking about ‘my customers’, and holding relevant knowledge in your head, toward a **centralized and transparent data and information management** approach in which thinking, working and acting in a team is the norm. Shared information is the goal.
- 3 Put the **inbound** and **content marketing** strategy into practice together with your customer acquisition team. Utilize your knowledge as a persuasion tool, and gain an edge by providing your lead with relevant know-how. That will open the door to new customers for you.
- 4 Take care of your existing customers, and intensify those relationships. Turn your **customers into fans**. Because fans are important to a loyal relationship, and even more important in terms of referral marketing.
- 5 Put the classic management role concept out to pasture, and run with the concept of the **potential-development coach**.

This practical guide shows you how to complete the five stages with excellence. These three digital experts will provide you with ideas and input:

As owner and CEO of management consultancy company SchmidtColleg, **Dr. Dr. Cay von Fournier** advises small and medium-sized businesses on how to release entrepreneurial energy in management practice. He describes himself as a digital immigrant who is very interested in the topic and was in fact already developing software professionally before the Internet existed (1990, CvF Bausoftware GmbH).

Marcus Bär is a member of the management board of CAS CRM, a SmartCompany of CAS Software AG. As a CRM expert, he helps companies to establish and implement customer relationship management as a corporate philosophy. His favored mission statement is “customer centricity”, which places the customer at the focus of all touchpoints, services and product developments.

How can companies set up an efficient, customer-centric process organization? **Nils Britze** is engaged in answering that question as head of Digital Business Processes with German digital association Bitkom e.V..





Step 1

Think of Marketing and Sales as a single entity, and create a unified customer acquisition and service team.

In the digital age, selling has become a complex business. This is firstly because prospects tend to conduct extensive online research in advance, meaning they are already very well informed when first contact is made. Secondly, in many sectors the professional buyers as such no longer exist. The influence of various departments is growing, so that on average seven people are involved in any purchase decision.⁵ Around three-quarters of all professional buyers want a personalized customer experience as is familiar to them from B2C business.⁶ Anyone capable of creating an attractive and convincing impression on an interpersonal level can gain a competitive edge on the market. Because nowadays there is always a comparable product. If a customer has a good feeling about the seller, that will influence their reasoned decision-making. It is a process that often takes place subconsciously.

“To be able to meet these expectations, Marketing and Sales must no longer operate as two separate departments,” says CRM expert Marcus Bär. “Ideally, their skills should be combined in a unified customer acquisition and service team.” When a team is looking to rethink the way they build and maintain customer relationships, they should first consider their attitude towards their customers, and how they want to interact with them. “It is important to set shared objectives,” Marcus Bär says. “That ideal picture represents the perfect customer relationship, and does not necessarily have to be immediately achievable in reality. But it does help the team to identify key questions when dealing with customers as well as making them transparent and tangible.”

CRM worksheet

This is how to create your ideal picture of a customer relationship:

Discuss the following questions, and document your results in a customer relationship manual. This will help you and your team to establish optimal relationships with your customers in day-to-day business.

Start in general terms:



1. What kind of relationship do we want to establish with our customers?

2. What role do our customers play in our business?

3. How do we acquire customers?

4. How do we interact with our customers so as to create a sustainable long-term relationship?

5. Which customers are most important, and why?

6. What makes our customers successful?

7. How can we contribute to our customers' success, and provide them with added value?

Get to the specifics:

What do we do when...



1. a prospect calls the first time?

2. we receive an order?

3. a customer complains?

4. a customer complains about the product, the benefits of the product or a product defect?

5. we are preparing for a customer visit?

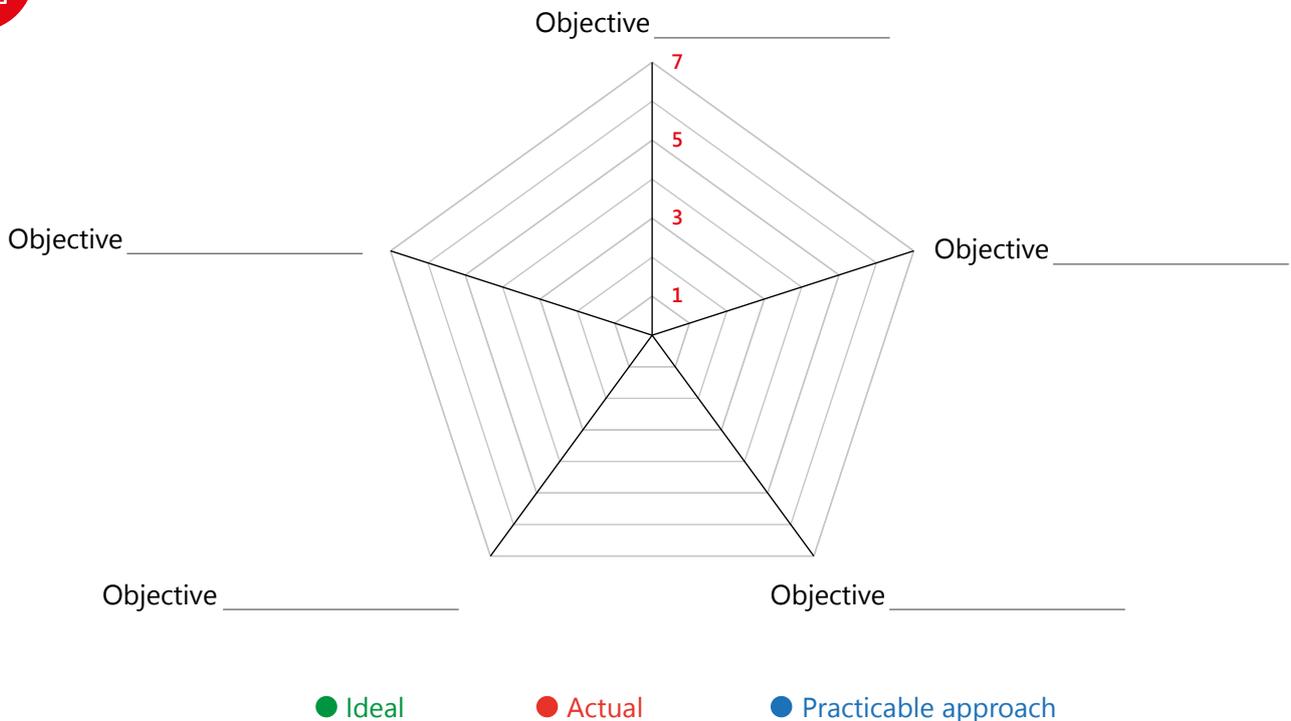
6. we collect feedback from a customer on our product/services?

7. we have lost a customer?

Target/actual comparison: How to identify areas requiring action



Where do you stand in relation to your target? Document your most important objectives. Set out the ideal, your actual situation, and current practicable objectives.



Have you gained an overview? Then consider what steps are necessary and useful to get closer to your ideal picture.

Objective	▶ Ideal	▶ Actual	▶ Practicable approach
_____	_____	_____	_____
_____	_____	_____	_____
Objective	▶ Ideal	▶ Actual	▶ Practicable approach
_____	_____	_____	_____
_____	_____	_____	_____
Objective	▶ Ideal	▶ Actual	▶ Practicable approach
_____	_____	_____	_____
_____	_____	_____	_____
Objective	▶ Ideal	▶ Actual	▶ Practicable approach
_____	_____	_____	_____
_____	_____	_____	_____



Poster to download

Download the A3 poster as a worksheet:

www.cas-crm.com/sales-4-0-ideal-picture-of-customer-relationship-poster

Three questions to Nils Britze



Nils Britze

Head of Digital Business Processes,
Bitkom e.V.



How important is digital transformation to small and medium-sized enterprises?

Digital transformation represents a great opportunity for SMEs. They can utilize it to compensate for the size disadvantages they have compared to industry giants. This is made possible by the economies of scale that digitalization brings with it. If implemented intelligently, it can help SMEs reach a wider target group. The problem, unfortunately, is that – according to the Bitkom Digital Office Index – SMEs are lagging behind in their digital transformation compared to large corporations. In a recent survey, we found out that the gap between large and small businesses is even growing.⁷ SMEs often lack the time or financial resources.



How can a business get fit for the future ideally?

A digitalization strategy is always a key element in digital transformation. In terms of Sales 4.0, that means looking at the linked processes: Where are the touchpoints with marketing, purchasing, and production? Information systems play an important role in shaping unstructured knowledge, and making it accessible to all. The CRM system thus becomes the hub of a departmental and inter-departmental organization of sales processes and customer relationship management.



How can CRM deliver sustained success right from the start?

As with any change process, it is important to engage staff from an early stage, so that no one feels overwhelmed by it. Often the change is most difficult for those employees who have already been doing conventional sales jobs for a long time. Mutual learning can be key to success in this context. Staff with 'old' analog skills and digital natives working in tandem means that the former learn what an instinctive approach to new media can achieve, while the latter learn how specialist experience and knowledge can be best used. This bears fruit when both gain added value from the collaboration.

Step 2

Change your attitude – away from thinking about ‘my customers’, and holding relevant knowledge in your head, toward a centralized and transparent data and information management approach in which thinking, working and acting in a team is the norm. Shared information is the goal.

The sales force is the spearhead of a business. Their success is reflected in closed deals. That in turn is usually rewarded in the form of personal bonuses. Some sales staff therefore tend to keep information on potential new customers to themselves until the last minute, as they see sharing their knowledge synonymous to missing an opportunity for a sale. Are you one of them? Then you need to rethink. Because the bottom line is that this mindset not only harms your business and yourself, but also your leads, who you want to provide with an optimal customer experience.

"The sooner you record the leads in a centralized CRM system, the better they can be followed up and worked on by marketing, sales, and customer support," says CRM expert Marcus Bär. This also avoids presenting leads with offers quoting different prices from different offices of the same company. CRM enables corporate data and contact details to be consistently structured and routinely updated. It means data can be segmented for marketing campaigns without having to create lists manually or carry out time-consuming duplicate checks. This might involve a company newsletter or an invitation to an upcoming customer event, for example, or a campaign drawing the attention of all customers of product A to product B, as a means of cross-selling.

Enhanced interpersonal relationships

By documenting the relationships of different contacts in a company, you can keep track of who is involved in the buying process, and develop a strategy regarding who you talk to, and in what way. If you link contacts to XING or LinkedIn profiles, you will always be just a click away from your lead's social media profile, and can gradually enrich the bare contact data with valuable additional information. You can find out more about the person's background, the discussions they are involved in, the posts they have read and liked, and the topics they are currently concerned with. All this information can provide you with points of reference in interpersonal dialog.

"Nowadays, talking to customers is no longer about just selling," says Cay von Fournier, digital entrepreneur and owner of management consultancy SchmidtColleg. "It's about value-based selling."

This means that, when interacting with leads, sales representatives must always ask themselves what benefits they can offer, and how they can support the customer. "The human element is becoming increasingly important in selling," Cay von Fournier says. "We are going back to our basic virtues, and spending more time with the person behind the buyer. We ask ourselves how we can help him, or fulfill a wish to make his life better."

While you are enhancing the interpersonal relationship with expert know-how, the CRM solution provides you with technical and organizational support. As a general rule: the more you invest in the system, the more you will benefit from it. "CRM systems today are more than just databases for address management," says Marcus Bär. "Rather, they perform the role of digital assistants. They remind us when we need to make a call or follow up on a quote. They enable automated sending of product brochures, and ensure that we can access the latest version of the customer master data file any time, anywhere." With the help of Artificial Intelligence, these digital assistants will in future even be able to detect the mood in communications, and provide hints to help when enthusiasm begins to sag. A tip from the system will then enable the sales executive to revive a flagging relationship by contacting the customer or paying a personal visit for example.

According to a recent survey by IT market researcher techconsult, 81 percent of companies that systematically log and process customer information in a professional database are seeing positive sales trends. For 75 percent, using a CRM system aids their customer acquisition. 80 percent see an improvement in customer loyalty.⁸

CRM practice

Three motivational boosts for data maintenance

Many sales representatives see maintaining the CRM system as overly time-consuming. Don't let this idea in: keep well organized, and discipline yourself to undertake routine data maintenance. Here are three motivational tips:

1. Think of your CRM as an investment: The more you put in, the more you will get out. Or in digital terms: Compare your CRM to a fitness app: The more training sessions you do, the better you will perform on your next company run, and you'll enjoy tracking and sharing your fitness progress.
2. Do the documentation work straight away – it'll only take ten minutes, and your CRM will help you.
3. Reserve time in your work schedule for further data maintenance on a daily basis. If customer inquiries and meetings start to pile up after lunchtime and later in day as you are thinking of heading home, there's a tendency to postpone the job until the next day. You're doubtless familiar with the idea of the mountain that at some point becomes seemingly unclimbable.

Three questions to Cay von Fournier



Dr. Dr. Cay von Fournier

Owner and CEO of management consultancy company SchmidtColleg GmbH & Co. KG



How seriously are SMEs taking the issue of digitalization in customer relationship management?

I am seeing that companies are usually aware of the importance of the issue, but not of the speed at which customer communications have been developing. There are certainly deficiencies in this respect. It's only a few years ago that marketing campaigns were still being run by fax. Comparing that to digital channels indicates the dynamic change that communications are undergoing. But I would differentiate between new startups and longstanding experienced businesses: Startups adopt a different approach than old-established SMEs, and don't need an exit strategy to shift away from traditional communication structures.



How can a '4.0 Sales' team be successful on the market and offer best customer experiences?

They must be able to sell in a value-oriented way. Examples such as Wikipedia have shown us how the business model of tomorrow works, and how disruptive it is: With the support of the community, Wikipedia has, within a very short period of time, replaced an encyclopedia that had evolved over centuries, and has impressively demonstrated how 'community value' is generated. Sales already operates in complete harmony with the customer. There is no longer any asymmetry in terms of information. That is why personalized service is becoming increasingly important. It's a fallacy that we no longer need to engage in dialog in the Internet age. The Internet is a predefined information flow in which dialog is lacking. But it is only dialog that enables us to grow and develop. That includes spending time together, and engaging with each other as human beings.



How can you manage your digital transformation when you feel like a stranger in the digital world?

In order to overcome inner obstacles, you have to develop your personality in a business-oriented way. That involves adopting an approach partly on a very personal level, partly on a very philosophical level, as well as considering the purpose of it all – the 'why'. Investigating the question 'why' is currently regarded as innovation, but it is in fact nothing new. Businesses adopting this trend without intrinsically considering that question must take care not to follow a wrong path: Personality can never be pretend; it can only ever be genuine. In practical terms, you can discover a lot about digitalization by looking over the shoulders of young people, and watching how differently they learn. It can be quite inspiring.

Step 3

Put the inbound and content marketing strategy into practice together with your customer acquisition team. Utilize your knowledge as a persuasion tool, and gain an edge by providing your lead with relevant know-how. That will open the door to new customers for you.

Professional buyers do extensive research on the Internet to find solutions and approaches to meet their challenges. Companies can take advantage of this searching behavior by providing relevant and value-added content to attract potential customers to their website and convert them into leads.

This marketing strategy is called inbound marketing. It includes search engine optimization (SEO), social media and, in particular, content marketing. Marketers use blogs, whitepapers, e-books, case studies, videos and webinars to address the needs, questions, concerns and pain-points of their target group, providing answers, expert knowledge and best practice examples. Surveys have shown that 47 percent of professional buyers look at three to five content formats in the course of their online research before contacting sales.⁹ And they are becoming increasingly choosy. For example, 88 percent believe that the content provided should focus less on product-specific information and more on the added value that businesses can achieve by using solutions and services.¹⁰

Marketing and Sales must develop a collective sense of their ideal customer.

In order to successfully implement inbound marketing, the Marketing and Sales functions must work together, forming a single unit as a customer acquisition team. "That also means, for example, that Marketing and Sales develop a collective idea of what the ideal customer is," says CRM expert Marcus Bär. The customer acquisition team then looks at the buyer's journey of this ideal customer and, in the lead management process, defines criteria and rules according to which Marketing and Sales interact.

The buyer's journey is the path customers take through to making a purchase decision. On that journey, they come into contact with your product or brand multiple times. The journey is not normally linear, but individualized, passing through different channels depending on personal preferences.

Digital touchpoints



Physical touchpoints

Just straight ahead? Certainly not!

The buyer's journey is very individualized, and doesn't follow a predetermined pattern. Your task is to scatter enough crumbs along the way so that your prospective customers find their way to you.

It is therefore important to support this journey at the right time via the various channels with appropriate content, services and advice. If you are able to support the buyer's journey optimally, you will increase the chances of being considered as a supplier.

Within the framework of lead management, you and your marketing colleagues define the individual phases of your internal customer acquisition process. What information and data do you need to be successful in sales? What realistic level of maturity do you want a lead to have attained when you receive it from Marketing? In what form does your marketing team receive feedback from you on whether you were able to turn a lead into a selling opportunity, or whether it didn't work? Do not be frightened by this challenge: it's about optimizing, not controlling. If the lead offered no chance of success, it's important that your marketing colleagues



know the reasons, and your judgment on the case. That is the only way they can tighten the criteria and enhance the inbound marketing process in order to support sales. The goal is always joint success.

Opportunities of digitalization in Marketing

Whereas Marketing used to work with Excel lists to ensure that leads who responded to A received B as a follow-up, and produced even more lists to share the results with Sales, digitalization is making great strides in that area too. Thanks to marketing automation tools, individual elements of a campaign can now be handled automatically, and in a highly personalized way, through smart segmentation and dynamic content. It's a real boost to your communications.

Also, marketing automation tools provide a complete overview of all customer-related activities: They track how often contacts visit the company website, which sections interest them, whether they download content offers and leave contact details for them, and how relevant the e-mails you send are to them. Offline activities, such as visits to trade fairs or customer events, can also be analyzed. All these activities are collected to create a lead score that is automatically calculated by the tool. When a lead reaches a certain score, it is transferred to the CRM system. The sales executive can see in the CRM software which activities their lead or existing customer has undertaken, and integrate them into their selling strategy. Sounds tempting? Then get on it!

CRM worksheet

How to define your ideal customer



Discuss and document the criteria by which your ideal customer can be tied down and described. Are they hard criteria, such as company size or sector? Or are there also implied soft criteria, such as willingness to learn, and interest in trending topics?

- Industry sector: _____
- Country/region/area: _____
- Company size: _____
- Interested in a solution for: _____
- Order volume: _____
- Other criteria such as existing references, in-house expertise, new market conditions, and so on:

- Soft criteria: _____

What customer personnel are involved in the purchase decision?

- | | |
|------------|--|
| Management | ▶ Who, and areas of responsibility? _____ |
| Department | ▶ Which department(s) and person? _____ |
| Specialist | ▶ What job titles? _____ |
| Purchasing | ▶ Who, and what job title? _____ |
| HR | ▶ Who, and what job title? _____ |
| Advisor | ▶ Who, what job title, and from which company? _____ |
| Other | ▶ Who, from which department, and with what job title? _____ |
- _____

The Customer acquisition process



Poster to download

Download the A3 poster as a worksheet:

www.cas-crm.com/sales-4-0-customer-acquisition-process-poster

How do you define your Customer acquisition process



Who is your Marketing-qualified lead (MQL)?

We have at least the following contact information about him: _____

We also know that he is interested in these topics: _____

This implies an interest in our product: _____

If he engages in the following activities, we assume that there is a high level of interest:

• Weighting on website visits: _____

• Weighting on visits to specific web pages (e.g. price list or configurators): _____

• Weighting on submitting online forms: _____

• Weighting on clicking e-mails: _____

• Weighting on opening e-mails: _____

Who is your Sales-accepted lead (SAL)?

Your sales representative indicates acceptance of the lead in the CRM system by _____

What is an opportunity in your company?

An opportunity is a Sales-accepted lead for which Sales has entered a selling opportunity in the

CRM as follows: _____

What is a customer?

When an opportunity has been gained, the lead becomes a customer. Sales makes this event trans-

parent by doing the following in the CRM: _____

Then you apply the philosophy based on the CRM Guide from step 1, remember?

Step 4

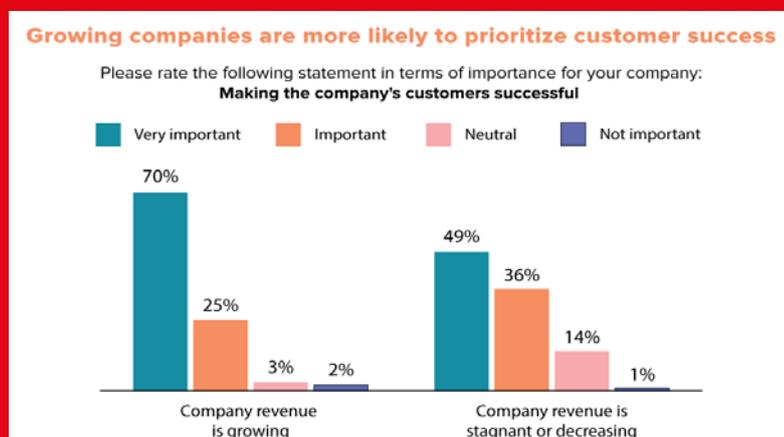
Take care of your existing customers, and intensify those relationships. Turn your customers into fans. Because fans are important to a loyal relationship, and even more important in terms of marketing by recommendation.

New customers cost money, existing customers bring in money. With that rule of thumb in mind, it quickly becomes clear that customer loyalty should be at the top of the list of your sales objectives. Due to competition, many products and services nowadays are so interchangeable that service and customer support are the decisive factors in terms of customer satisfaction, and therefore loyalty. Empirical studies show that acquiring new customers is about five times more expensive for companies than existing customer care. Nevertheless, many companies are not leveraging that treasure.

Although three out of four buyers state that they tell others about positive experiences with service providers – whether in person or online – only one in two believes that it is important to the providing companies whether they are actually successful with it. Yet customer satisfaction has a decisive influence on sales growth. According to the “Customer Success Feeds Business Success” survey, 70 percent of the companies with increasing sales rate the success of their customers as “very important”. Of those with stagnating or declining sales, that figure drops to 49 percent, or less than half.¹¹

Interdependencies of success

The “Customer Success Feeds Business Success” survey asked companies how important it is to them that their customers are successful:



Source: HubSpot Customer Success Survey, Q2 2017, updated December 2018 ¹²

"Once the purchase is complete, the aim is to turn the customer into a fan," says CRM expert Marcus Bär. "As a sales executive, I can do that, firstly, by keeping myself constantly up-to-date with the issues my customer has addressed to Customer Support; and, secondly, by exchanging ideas with him in person at regular intervals, and helping him to attain his goals." If the interchange is fruitful, up-selling and cross-selling opportunities are easier to exploit. Also, feedback from customers, and their ideas and visions, can act as a key driver for the company's own product development.

With the help of a CRM solution, you can create opportunities for interpersonal exchange quickly and easily: Set reminders for the time or event when you next want to contact a customer. You can set up the reminders automatically as tasks for example: maybe three weeks after signing the contract or the installation, or one day after a customer has opened a support ticket. Ask actively how they are doing personally and work-wise, whether their project "xy" has been as successful as hoped, what experience they have gathered in the course of the project, or whether they have time for a business lunch together at the next trade fair. Since you typically do not have sufficient resources to be available to every customer equally, you should modify this strategy accordingly. "For example, customers could be categorized by turnover, contribution margin or future potential, and more attention could be paid to C-customers with high potential in order to develop them into A-customers," suggests Marcus Bär.

Face-to-face meetings strengthen customer relationships. Do you really take every opportunity to visit your customer? If you're planning a trip to Munich to visit customer A, a map check in your CRM system will tell you that customer B is located just a few streets away and could also be visited. If an appointment is canceled, your CRM software tools will help you arrange an alternative appointment with another customer at short notice. Your mobile CRM means that you always have contact details, customer master records and current support case files to hand wherever you are. "In this way, more visits can be made very efficiently, and existing customers can be looked after more personally," Marcus Bär concludes.

Step 5

Put the classic management role concept out to pasture, and run with the concept of the potential-development coach.

"SMEs place high value in corporate philosophy and culture," says Nils Britze, head of Digital Business Processes at Bitkom. "That makes it even more important to develop a digital transformation strategy that is compatible with your business's own corporate philosophy and culture. The good thing about digital transformation is that you never approach it alone, but always together as a team." Because digitalization is all about connection. What steps do companies need to take in order to achieve it?

"In terms of digitalization, it is becoming increasingly important to develop potential jointly," says Marcus Bär. "I am convinced that we have to redefine the classic management role in this context – away from the authoritarian boss image, toward that of a potential-development coach." Managing means developing and realizing business potential jointly. In practice, this entails setting a shared objective, such as digitalization of customer relationship management. The objective becomes official when you communicate it transparently as such by way of a kick-off procedure. It's then all about persuading the team to commit to achieving it:

Our company utilizes customer relationship management because:

Digitalizing customer relationship management is necessary for us because:

We chose the system provider because:

We brought you in on the project team because:

"Commitment is important in order to start the process with enthusiasm and drive," says CRM expert Marcus Bär. It is part of the change process that your business will confront subsequently. A process that will not become reality from one moment to the next, that will have its ups and downs, and that might also miss its target. However, the more enthusiastically you work together as a team on the common cause, and the less you lose sight of your goal, the more commitment you will generate, and you'll get where you want to go, because your inner, intrinsic motivation is right.

How a good leader acts

Four theses by Prof. Dr. Peter Kruse (* 1955 – † 2015), who was a researcher in organizational psychology.¹³

Thesis 1: A good leader has a vision, and provides a long-term perspective.

Thesis 2: A good leader motivates staff, engages them with his or her ideas, and stimulates energy.

Thesis 3: A good leader mobilizes and inspires his or her team.

Thesis 4: A good leader gets the business moving.

So as not to fall by the wayside along the route, it is advisable to follow a sequence of realistic steps. "When we start a CRM project, we first look at its goals together with our customer," Marcus Bär reports. "We then look at what the standard software already has to offer in terms of attaining the goals." What are typical tasks? What is the standard process? Which quick wins can be achieved? Marcus Bär continues: "First, selected key users receive on-the-job coaching in use of the CRM solution." Once they are familiar with the software, the specific requirements are defined and configured. Only then is the CRM solution implemented, and staff training given, company-wide. "We have had very positive experience with this agile approach," Marcus Bär reports. "Because many people only realize how much a digital process can differ from the familiar analog process once the project is up and running."

About CAS genesisWorld

CAS genesisWorld is one of Europe's leading CRM solutions for small and medium-sized enterprises (SME). More than 480,000 people in over 30,000 companies and organizations worldwide, including global market leaders such as Daimler, Airbus, Fraunhofer and OKI, as well as hidden champions such as ASYS Group, DELO, Dürr Dental and Team 7, enjoy the benefits of using our software solutions: best ergonomics, flexible and capable of integrating with existing software and offer excellent value for money.

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