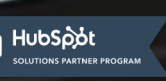


Concept.

CRM UTILIZATION





CRM UTILIZATION

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEMS ARE HELPFUL TOOLS FOR A RANGE OF DEPARTMENTS - FROM SALES AND MARKETING TO ACCOUNTS RECEIVABLE AND OPERATIONS. IT CAN HELP YOUR BUSINESS FIND HOLES IN YOUR MARKETING STRATEGIES TO CLOSING THE INVOICING GAPS.

Since Concept's beginning, we have relied heavily on CRM to support both our business internally and to help our clients grow through our Salesforce consulting services. We serve as a Salesforce and HubSpot partners who provide solutions that help our clients make the most of their CRM platform.

Salesforce and HubSpot CRMs are great solutions for businesses who need insight into their operations, sales, and marketing.



GET ACTIONABLE REPORTS

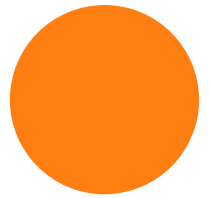
BENEFITS OF UPDATING LEGACY CRMS?

IF YOUR BUSINESS HAS BEEN USING A LEGACY CRM AND NOT GLEANING MUCH INSIGHT INTO EVERY ASPECT OF YOUR BUSINESS, THEN IT'S TIME TO INVEST IN TECHNOLOGY.

While CRM tools are not new to sales or business development, their importance increases due to the prospect profiling and lead quality data accessible to sales and marketing teams. As a buyer's journey becomes more complex, a tool to track contact/account information, interactions/activities, and next steps is vital to ensure the best customer experience.

As the end of year approaches and 2021 planning is occurring, it may be time to update to a newer CRM or bring your current system up-to-date. In our new normal, strategic planning and execution is essential to staying profitable. Gain the insight into forecasted revenue and high-performing programs.

UPDATING LEGACY CRMS



Two of the CRM leaders that we see continuing to set the bar in the CRM space are Salesforce and HubSpot.

CONCEPT IS PARTNERS WITH THE TOP CRMS

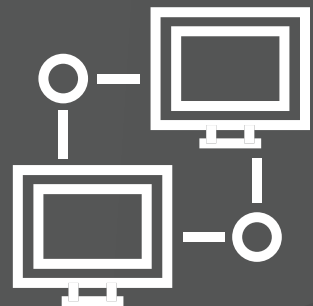


EXPANDED OFFERINGS IN CRMs

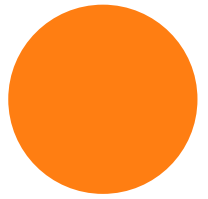
SHARE IMPORTANT INFORMATION ABOUT CLIENTS/CUSTOMERS ELECTRONICALLY

How many times have you received a printed copy of an email about a prospect or sales lead that you later misplaced? Or have you brainstormed new industries you go after but don't know how many clients you currently serve in that particular area?

Salesforce has a great tool called Salesforce Chatter where you can connect, collaborate, and act within a secured environment. You can follow people or create groups within your company's private internal network. You can also tag people, collaborate on sales opportunities, service cases or projects. Each user can manage what type of notifications they receive from Chatter. Imagine being able to utilize this in your business and streamlining so many emails, phone calls, or popping into someone's office.



BENEFITS OF CRM_s

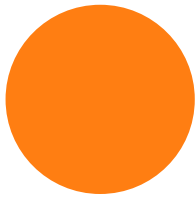


TRANSPARENCY

Another bonus to Salesforce, it gives you a 360-degree view of your customers. You'll be able to see every angle of every relationship - who they are, what stage of deal they're in, and interactions between your sales department and your customers.

CONTACT INFORMATION

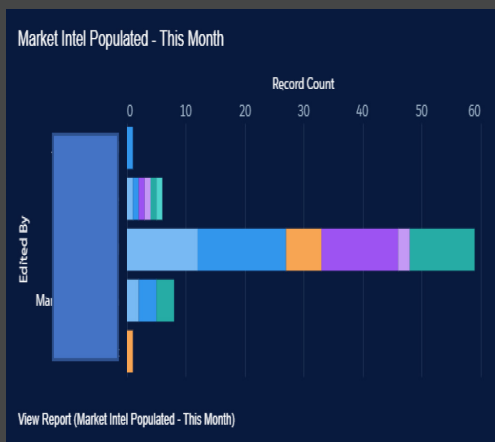
Do you have a stack of business cards in a desk drawer? Utilize a CRM to manage contact information for all your prospects and customers. See what pages on your website they visited and use that to help build stronger, more meaningful conversations.

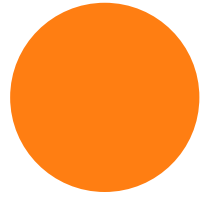


REPORTING

Does it take several hours to figure out how much customers owe to your accounts receivable? Are you able to easily see converted leads as new clients?

A CRM can create important operational reports for your business, so you can see how things are performing at-a-glance. Salesforce is a powerful CRM that can slice and dice your data in various ways. Want to see what sources your new leads came from? Use a CRM to get all this type of information at your fingertips.





MAIL/EMAIL LISTS

If you like to send direct mail postcards / letters or emails as a form of communication, how easy is it for you to pull a list together? With a CRM like Salesforce or HubSpot, you can easily pull a list with just a couple of clicks. And since all the customer/prospect information is housed in the CRM, you can begin to talk to people more specifically – about what their specific needs are.



PLAN TASKS

Within HubSpot and Salesforce, use your CRM to schedule tasks like following up with a new prospect. Don't worry about relying on your or someone's else memory. Let your CRM do the work for you. Put your priorities into your CRM and let it help guide you on your daily tasks.

AUTOMATION

While the name sums it up, automation is essential when it comes to the execution of effective marketing strategies. Once you develop the ideal journey of a prospect or a customer, a marketing automation tool allows you to ensure the journey is executed at the exact time and trigger you prefer. Rather than relying on individual team members to execute each of these activities, effectively leveraging a marketing automation platform can improve efficiencies and save both time and money.





IT'S NOT ABOUT CLOSING THE SALE
TODAY; IT'S BUILDING THE PIPELINE
FOR TOMORROW.

THE Concept. DIFFERENCE

AS THE LANDSCAPE OF B2B MARKETING AND SALES DEVELOPMENT CONTINUES TO EVOLVE AND BECOME MORE COMPLEX, ORGANIZATIONS ARE LOOKING FOR WAYS TO QUANTIFY AND ASSOCIATE REVENUE DOLLARS TO ALL ASPECTS OF THEIR MARKETING & SALES FUNNELS.

Sales and marketing leaders need to continue to evolve with the ever-changing landscape. Ensuring that your team stays focused on the areas mentioned can help best position your team for sales development success.

CRM implementation or integration by a certified, experienced team is key to ensure the CRM fits your unique needs of your business. By choosing experts that have helped clients across the spectrum with Salesforce implementation, you're giving yourself access to data that provides actionable steps for you to grow your bottom line. And Concept has the Salesforce and HubSpot certified team your business needs.

Ready to get an in-depth view into your business with Salesforce or HubSpot?

**WE OPEN THE DOOR.
YOU CLOSE THE DEAL.**



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