How To Develop The Sales Process Using CRM

Both practice and statistics show that a good CRM (Customer Relationship Management) system makes a valuable input to your business success. And that includes various processes, from smooth internal communication to personalized marketing campaigns. Each team and its employees can benefit from using a CRM. Especially nowadays, when it can be highly adjustable to the needs of each team/company.

Still, customer support and salespeople are the ones who mostly exploit CRM systems. And not in vain: according to Hubspot, 75% of sales managers say that using a CRM helps to drive and increase sales. The advantages come from managing multiple information effectively: CRM helps in storing and organizing customer/prospect/lead contact information, tracking customer lifecycle stage, identifying sales opportunities, managing activities, scheduling appointments, etc.

Well-chosen and properly used, a CRM system can significantly increase sales. The growth can reach up to 29%, according to Salesforce. So adopting the Teamgate CRM is a reasonable step for any-sized company that is interested in how to develop a sales process and make it way smoother.

Making CRM custom: Adaptations and their benefits

Every company is unique and has its own needs and processes, including sales flow. For this reason, a *good CRM software* means an *adaptable CRM software.* Each CRM has some common elements: contact cards, opportunity management features, performance analysis tracking, etc. However, what makes the system efficient is *customization*. Like in nowadays marketing, where personalization is the queen, customizing is just as effective in CRM systems.

You can adjust Teamgate CRM via custom fields and tags. Our software offers four main sections— People, Companies, Leads, and Deals. You can edit each of them via custom fields according to the needs of your company. The fields may include such specific information as birthdays, hobbies, interests, company size and profile, industry, deals budget, decision-making process, competitors, and much valuable info.

In short, with the Teamgate CRM system, you can comfortably customize different processes:

- *Customize information.* Necessary and useful lead, customer, and deal information allow making well-informed decisions. That includes taking the best actions, implementing effective marketing strategies, and understanding at which stage of the sales pipeline you are.

- *Customize communication*. The information about clients also helps in choosing the right interaction. Personalized emails and messages that are based on clients' behavior and interests will make them happier: research shows that 90% of users find personalization appealing.

- *Customize activity*. Teamgate CRM system has analytical tools. Among other indicators, it can show you what works best and brings the desired outcomes. Take a look at initial calls, follow-ups, newsletters, meetings, and so on. Tracking and interpreting the data allows you to see clearly your buyer's journey and make adjustments if necessary.

Sales pipeline: improving your sales process

So we talked about how the Teamgate CRM can help you in the sales process. However, one of the frequent pain points is managing a sales pipeline. Various surveys show that around 60% of sales managers say that their company could do way better in managing the sales pipeline. As it covers the whole sales process step by step, the sales pipeline should match your buyer's journey as closely as possible. So having a clearly defined sales process is a must for any successful sales team.

Want to get fresh inspiration? Here, you can download the free CRM sales process flowchart. It may serve as an example of the improvements.

Once again, the CRM system can help you here. If you wonder how to develop the sales process but still have not found the answer, a sales pipeline management tool might be the solution. For example, the Teamgate Sales Management feature is a simple way to improve the productivity and profitability of the sales team.

Here are some of the **benefits** you get when you decide to implement the Teamgate Sales Management tool.

- *Easy management.* You can track the CRM sales process effectively and visibly. The *drag and drop* functionality in the Teamgate Sales Management tool makes it super simple to move prospects smoothly through each stage of the pipeline. The intuitive interface eliminates managing struggles and increases your productivity.

- *Functional visuals.* Not only can you track a prospect's journey step by step—but also to identify the obstacles before it gets too late. A visual display of your sales pipeline allows you to perceive the process more clearly.

- *Multiple sales pipelines.* It happens that a case becomes complex because of too many different factors. To avoid the chaos and keep it smooth, you can create multiple sales pipelines with their tags, reports, and searches. Teamgate CRM is created for simplicity so enjoy the order at every step.

- *Insightful sales funnel.* Tracking and measuring the data is inevitable for ever-growing business. With the TeamgateSales Management tool, you can choose the concerning factors and view the info in the dashboard, or take a look at the insights. An insightful sales funnel will help you track deals movement, check conversion rates during a specific period, and plan sales process improvements.

Multiple currencies. If you deal with clients from different countries, the deals likely happen in multiple currencies. To make it smooth, you can assign a currency for each deal in Teamgate CRM. Foreign currency deals will not confuse anymore: you will not need to convert yourself—the system will submit the final reports in the currency of your choice.**CRM software: Solution for your business success**

Having a clearly defined sales process is essential for a and profitable business. The right CRM system can be invaluable help here. If you have questions on how to implement CRM and make it work, contact Teamgate. We consult on a wide spectrum of CRM-related topics such as exploring the possibilities of the system, sharing the best practices of using the CRM, or creating your unique customer's journey.