

*Key Insight*

# 3 CRM TIPS FOR QUICK SALES WINS

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walk me



# CRM Onboarding as Never Before

Find Out How >

CRM skills help with modeling both current and future customers. While the objectives of CRM software platforms are to achieve maximum value and loyalty from your customers, many people are unaware of how to operate them. The software is often complex to operate, learn and master, and sales managers often face user hesitation and errors on the road to performance competency.

In fact, many employees come into a company needing to be trained extensively and repeatedly before being allowed to work freely, therefore resulting in lower, or at least slowed performance levels. Below are three tips that you can teach employees to help with quick sale wins to boost their own commission or to increase revenue for the company.

## 1

### GET TRAINING PERFECT FOR CRM

It is vital that you are giving your employees the necessary training to succeed within your company. Not only does this allow the employee to flourish in both financial compensation and move ahead in their positions, but it also promotes financial growth within the company, bringing in larger revenue streams. When you provide effective and impactful CRM training, you want to promise your employees that you are going to be able to cater to them and to help them with their job.

Some tips for training:

- Link the training directly to everyday actions that employees will be required to perform.

- Set clear training objectives, and have open communication with the learner each step of the way in order to monitor progress.
- Make sure you follow up once the initial training sessions end. As Gartner Research has suggested, you can “improve CRM training effectiveness by conducting reinforcement training [several] weeks after the Go-Live.”

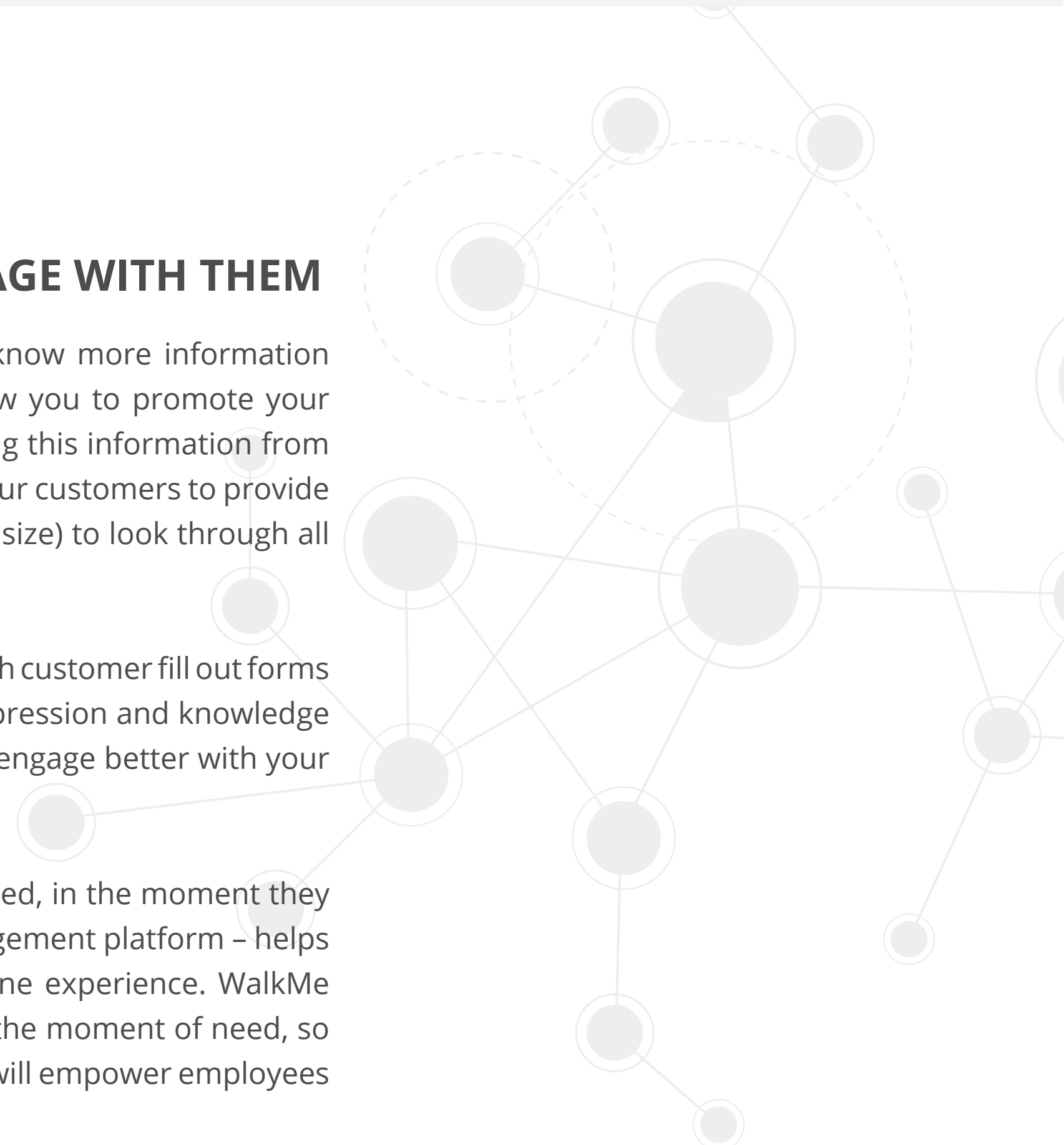
Many employees are held to higher standards than the company is and it becomes problematic with longevity in a company. When a company gives their employees all the tools necessary with their CRM training to work successfully and productively, it shows the employee that they are also expected to achieve for bigger and better.

## 2 KNOW WHAT USERS NEED AND ENGAGE WITH THEM

Keep the information simple, but collect enough information to know more information about your customers. Email addresses and phone numbers allow you to promote your business through advertisement and marketing. However, collecting this information from your customers can also promote a better way of business. Allow your customers to provide feedback and distribute a member or a team (varying on company size) to look through all feedback and catalog it.

Engage with your customers through their written feedback from both customer fill out forms and online forums and social networks. People are in an age of expression and knowledge and the internet is flooded with potential feedback to allow you to engage better with your customers.

In addition, you want to provide your CRM users with what they need, in the moment they need it the most. WalkMe – the enterprise-class guidance and engagement platform – helps CRM managers to guide and engage employees through any online experience. WalkMe simplifies CRM usage, in providing direct step-by-step guidance at the moment of need, so that users can work efficiently and successfully. It's a great tool that will empower employees to work faster and more successfully.



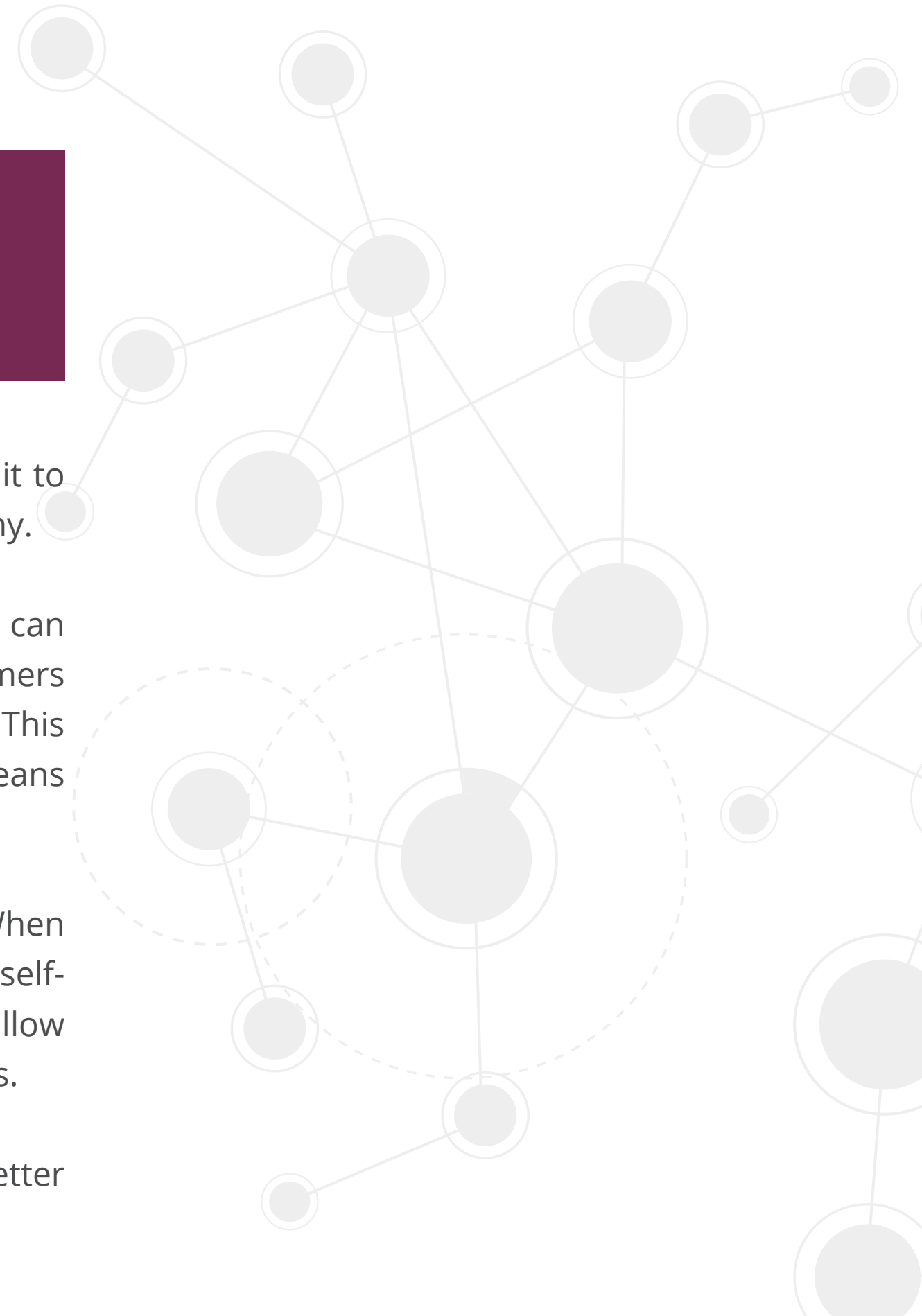
## 3 USE SOCIAL CRM FOR SUPPORT AND SERVICES

Social networks are a large avenue for revenue when it comes to CRM. Using it to help with customer support and services will help with expanding your company.

First, provide customers with ease of access. For example, larger companies can divide their store into departments that are coherent and cohesive to customers and setup a Facebook, LinkedIn and/or Twitter profile for each department. This allows your customers to avoid overwhelming themselves with using digital means of searching and shopping.

Next, it will be important to remember that self-support can always work better. When you are looking into social networks or websites, yours should contain the best self-support. Frequently Asked Questions (“FAQs”) and other easy-access tools to allow customers to provide for themselves will help with quickly selling your products.

The more accessibility and independence you put in your website design, the better sales.



## ABOUT WALKME

WalkMe provides a cloud-based platform designed to help CRM managers to guide and engage employees through any online experience. WalkMe simplifies CRM usage, in providing direct step-by-step guidance at the moment of need, so that users can work efficiently and successfully. WalkMe removes the barriers of entry from other CRM systems, and increases user productivity while lowering helpdesk requests, and reducing onboarding and training time and costs.

Through a series of interactive tip balloons overlaid on the screen, tasks are broken down into short, step-by-step guided instructions, which help users act, react and progress during their software usage.

As a result, both during the initial CRM orientation process and beyond, managers can empower their users so they no longer need to focus on the technical aspects of operating the software, freeing them to become more productive and avoid errors through even the most complex processes.

**Is CRM Onboarding  
Taking Too Long?**

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