



OGL
Software

How can a CRM benefit wholesalers & distributors?



Wholesalers, distributors and merchants are looking to technology to help them stay competitive, meet customer demand and digitalise their operations to ensure they future-proof their business. An ERP solution, with a fully integrated CRM system, should be the core of any stockist business, to ensure they're working effectively to manage their stock and sales.

What is a CRM?

CRM stands for Customer Relationship Management and is essentially a piece of software that does just that; it manages your customer relationships throughout their journey with your company. Whether that is existing customers or potential clients, the software is built to manage, profile and report on your customers throughout their entire sales journey in all areas of the business. A CRM system is designed to digitally store all the information you've ever sourced, filed or created about your customer contacts in one central place. This includes contact information, business research, financial records, orders, quotes and all communications (whether that be over the phone, on your website or via email).



How a CRM can future-proof your business

In order to tackle the common challenges faced by the distribution industry, you need to have (and be able to continually monitor and improve) the three key, future-proofing business objectives; control, visibility and efficiency.

Without control over your stock and your overhead costs, without visibility of your sales and company performance and without optimum business efficiency in your order processing, sales teams, purchasing & accounts and your warehouse, it will be almost impossible to grow and improve your business.





Why have a CRM?

A CRM can help you to achieve the 3 key future-proofing business objectives not only within your sales and customer management departments, but the benefits of a CRM filters through to other departments. A CRM helps to manage your customer and prospect data from one central place, which means you'll be able to effectively track customer interactions and sales opportunities, build strong relationships with your clients as well as ensure your data is accurate and up-to-date.



Signs you need an integrated CRM

Businesses often begin life using spreadsheets to keep track of customer accounts, quotes, orders and sales opportunities. This can quickly get out of hand as your company expands and spreadsheets become unmanageable. We've detailed below some warning signs that your existing manual processes are hindering your potential and it's time to transform the way you manage your contacts.



No single database for information

Are you, or your employees, spending a lot of time doing tedious admin tasks? Or are you relying on an outdated, hard to maintain filing system that makes accessing customer information a headache? Without a central storage solution, all areas within your business lack an accurate view of your customers' key information and interactions.



No visibility

Visibility is key to driving your business forward, because with out a clear view of what you're currently achieving, it's impossible to know how to improve. If you don't have visibility of your customers' journey, purchasing behaviour, prospect enquiries or your sales pipeline, you could be losing opportunities. You'll also lack insight into your sales team's performance, which means it's difficult to manage your sales reps and help them improve their success rates.



Manually collate reports

Collecting data, analysing and collating reports takes you much longer than you'd like and often you're relying on your best guess. If you don't have easy access to reliable, accurate data of your sales team's performance, you're at a disadvantage. Viewing your key KPI figures should be an automated, easy monthly or even daily task.



No mobile solution

You have sales reps on the road that have to make notes on paper and report back to the office to get customer details, price enquiries and orders placed on to the system. This duplication of work and delayed access to information could hinder your chances of securing a deal but also increase the likelihood of data errors and forgotten opportunities.



Sales opportunities are lost

It's hard for your sales team to keep track of their enquiries and opportunities and they often lose sight of where their potential customer is at in their journey, making it difficult to effectively communicate. Plus, you don't target your existing customers with cross-sell or up-sell opportunities to help increase order value.



It's hard to create targeted marketing campaigns

You rarely market to your contacts and when you do it's often a single communication with one message to all your data. You don't profile your data based on their business types, location, industry or previous orders. This means your not effectively utilising your marketing campaigns to target specific messages to your prospects, therefore reducing the chance of a conversion.



It feels impossible to scale

You already spend far too much admin time in all areas of the business and you can't imagine how you and your team could cope if your customer base doubled in size without hiring more people. If you're looking to grow or you're already struggling to efficiently meet demand, you'll benefit greatly from an ERP solution with an integrated CRM.

Key benefits of a CRM

Save you money

A CRM system will remove the unmanageable and unreliable manual processes ensuring your customer information is stored in one central system that's accessible to all who need it. It'll take away the hours of manually collating documents, profiling data and searching for customer account information.

Work more efficiently

A good CRM system will provide you with the platform to collaborate with other areas of the business so employees can highlight sales opportunities, discuss recent customer visits or report on a current purchasing trend, for example. It allows all departments to work from the same accurate, live data to make daily processes easier. With complete visibility and control, you can understand your market, target your audience effectively and spend business hours working on sales instead of admin tasks.

Increase sales

A CRM can enable you to profile customers, report on buying trends and target them with tailored marketing campaigns. It can also highlight leakage opportunities, areas for up-sell and relevant promotions to increase spend. The system is designed to collate information, highlight opportunities and help your sales team keep on top of their activity.



Key features of a CRM



Contact Management

Easily store and update contact information including order history and previous communications



Lead Management

Keep track of sales leads from initial enquiry to sale with visibility of tasks and scheduled reminders for follow ups



Reporting & Analytics

Personalised dashboards and detailed reports improves accuracy and forecasting so you can meet KPI's



Email Integration

Integration with Outlook means your sales team can access emails and historic communications from one place



Centralised Database

Store documents, communications and historic information in one place to improve accuracy



Employee Activity Reports

Keep track of employee activity to ensure sales opportunities are never missed



How to get the most from your CRM

Investing in a CRM enables your business to improve on its customer service, marketing efforts and sales opportunities. However, simply implementing the software won't revolutionise your business. It's important that the CRM users know how to fully utilise the software and that the business is making the most of its automated processes to boost productivity and drive the business forward. It's important to create a plan across the business to ensure you can fully realise the CRM benefits.



Create a business strategy

The software can help you achieve your goals but it can't create the best strategy for your business. It's important that you identify your goals, create your strategy for how you want to get there and then implement or utilise a CRM to help you achieve your plans.

View your software implementation as an opportunity to review and optimise your existing processes. Instead of simply using the CRM to carry out your existing processes, take the opportunity to understand how the software could transform the way you operate in order to remove any inefficient operations. Embrace technology to transform the way you work to optimise effectiveness enabling you to focus on business development and not tedious admin tasks.



Staff training

It's important for your team to be fully trained on the software and keep up-to-date with new features and functionality so they can fully realise the software's potential. Select super users so individuals take ownership of keeping up-to-date with new software releases and ensure the team stays on track.



Get the team on board

Implementing a CRM, or any business software, often means a change in processes and for optimum performance, it can usually mean a shift in culture within the company. Perhaps this involves how the pipeline of sales is managed, or how you maintain customer retention or simply the way staff record their tasks and actions throughout the day.

A CRM can highlight the areas needed for improvement, but it won't enforce the change on the users. Making the most of your software relies on management enforcing the changes and staff getting on board. Often easier said than done!



Collect data

This is actually one of the things a CRM system does extremely well, but there is groundwork to be done before your software can give you back the information you need.

Your experienced sales staff still need to understand the market you're in; its trends and changes that continue throughout the year. They also need to identify the audience you're targeting and set characteristics and segments that will populate your CRM, so it can then effectively profile your database. When your data is correct and kept up-to-date, you can then use the reporting tools within the system to profile your whole database and create marketing campaigns suitable for each customer group.



Identify metrics

Without identifying what you want to measure and understanding what you'll need to do in order to achieve your business goals, it's impossible to know what to measure and what's of importance. The amount of data you can glean from your CRM will be endless, and at first overwhelming, so once you've decided what you want to measure, ensure your team are fully aware. You can then create personalised dashboards to help your staff track their progress.



quality *next day* cleaning supplies

OGL Software helps System Hygiene to buy better and sell smarter

Before OGL Software, System Hygiene managed their business processes using paper-based systems and basic office software. Running so many manual processes was proving a headache until they spoke with a fellow OGL Software user who recommended the software. System Hygiene's Marketing Manager told us, "They were right – we needed a robust and integrated solution behind our business and OGL Software fitted that brief."

With over 5,000 customers and future plans to continue to grow the company's online presence, System Hygiene needed a solution that would stand the test of time. They needed a solution that could better manage their expanding portfolio, help them trade online, enable smarter marketing and improve customer service.

"We have over 5,000 customer records, more than our salesforce could possibly

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We put customers at the heart of everything we do - a promise that OGL has helped us keep for over a decade.
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see in person over the year. We needed other dynamic ways of constantly keeping in touch. We knew we needed all our diverse customer information from sales, accounts and marketing in one place... and with OGL we had our figures at our fingertips.

“The CRM module has a built-in email function that allows us to segment and send e-shots to over 160,000 of our named contacts about safety news, product launches and promotions. This has been fundamental for maximising customer spend.” The CRM has allowed System Hygiene to keep track of all communications from direct mail to email and phone, to better understand their marketing efforts, respond to trends and nurture existing customers to maintain their goal of putting customers at the heart of everything they do.

System Hygiene chose OGL Software because, “it was more connected than other systems. The various modules for accounts, sales, marketing and warehouse spoke to each other and were perfectly customisable to our needs. OGL Software was more flexible than other systems and could genuinely adapt as we grew.”

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Embrace technology to future-proof your business

Pick a solution built for your industry to maximise ROI. For wholesalers and distributors, implementing an ERP solution that has a fully integrated CRM at its heart is the most effective way to maximise success. Not only will an ERP with a CRM give you visibility and control over your sales and customer relationships, but it'll also transform the way you manage your stock, purchase your products and process your orders.





Get in touch

Get in touch with our software team to find out more about our CRM and ERP solutions
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