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The Roadmap to Choosing the Right CRM

For Manufacturers and Distributors



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Why **Old-school CRM** Doesn't Work with **Manufacturing**

Navigating the Shift: Why Traditional CRM Falls Short in Manufacturing

The traditional CRM platform you've grown familiar with doesn't cut it in this manufacturing age (it never really did, let's be honest).

There, we said it.

It's kind of like trying to plot out a road trip using road maps pre-GPS; that required a lot of manual work and you never knew what problems laid ahead in your journey. The manufacturing sector, heavily reliant on a steady stream of orders from loyal customers, finds its lifeline in robust customer relationships.

And that's where traditional CRM systems falter – they're not tailored for the unique pulse of the manufacturing world.



The Square Peg in a Round Hole

Most CRM platforms in the market are built as universal solutions, designed to fit a broad spectrum of industries. But manufacturers' needs are distinct. You are special. And we love that for you.

The "universal solution" approach requires extensive customization of these generic systems, not to mention resources, to make them kind of, sort of, work.

So what makes you, dear manufacturer, **special**?

- ✓ You depend on repeat sales from an established customer base.
- ✓ Your sales teams are frequently on the move.
- ✓ Your sales process is centered around orders and quotations.
- ✓ Your products typically reach end-customers through distributors.
- ✓ You can't resist building complex customer relationships that span multiple departments (just kidding, we know it's important).

The Mismatch: Traditional CRM in a Modern Manufacturing Landscape

Traditional CRM systems get the job done in environments needing basic record-keeping of contacts, companies, and opportunities. But they crumble like an overbaked cookie in the manufacturing context.

Field sales teams often lack the time for detailed data entry, such as logging meeting notes.

Moreover, crucial order data from your ERP remains inaccessible within standard CRM frameworks.

DATA SILOS = BAD FOR BUSINESS

These systems are not designed to handle the intricacies of orders or map out complex distribution networks.

The Core Challenge: Aligning CRM with Manufacturing's Heartbeat

The manufacturing industry, with its customer-centric and relationship-driven ethos, demands a CRM solution that resonates with its core.

The industry thrives on personal connections, necessitating a CRM approach that scales these relationships while retaining their personal touch.

The Quest for the Right Fit: Choosing a Manufacturing-Centric CRM

For manufacturers and distributors on the lookout for a CRM, your challenge is finding a system that aligns seamlessly with your unique business goals and challenges.

Like a GPS, this guide will steer you through the CRM selection process, highlighting the features you need to consider and ensuring your choice delivers tangible results for your team.



Manufacturers Need a New Kind of CRM

What you really need is [visibility](#) into sales activity and control over your sales processes.

Your next CRM doesn't have to be a headache for the sales team and confusing to management. Find a system that makes life easier for your team and gives you the insights you need.

But any old big-box CRM isn't going to work unless you're ready to shell out major time and money to customize the hell out of it.

You need a CRM tailored to your unique needs, that gets you up and running and seeing value fast.

What does this mean for you?

Your CRM should be a Swiss Army knife

- ✓ Automating data entry and contact creation
- ✓ Importing all phone and email communications seamlessly.
- ✓ One-stop view of all customer and activity data, including order data from your ERP.
- ✓ Going beyond CRM capabilities by providing sales enablement and analytics.
- ✓ And yes, providing a mobile app for your ever-moving field sales team.

Get Value Out of Your CRM Right Away

You've heard the stories. A company buys a CRM. Sales tells management it will be up and running by Q3. Halfway through the following year, no one is using it.

In come the consultants...

When you buy a CRM, you need to get your money's worth, fast. You can't afford to buy ten add-ons to get anything done, let alone third party consultants to tell you how to run your business.



Order Data is Sales' Best Friend

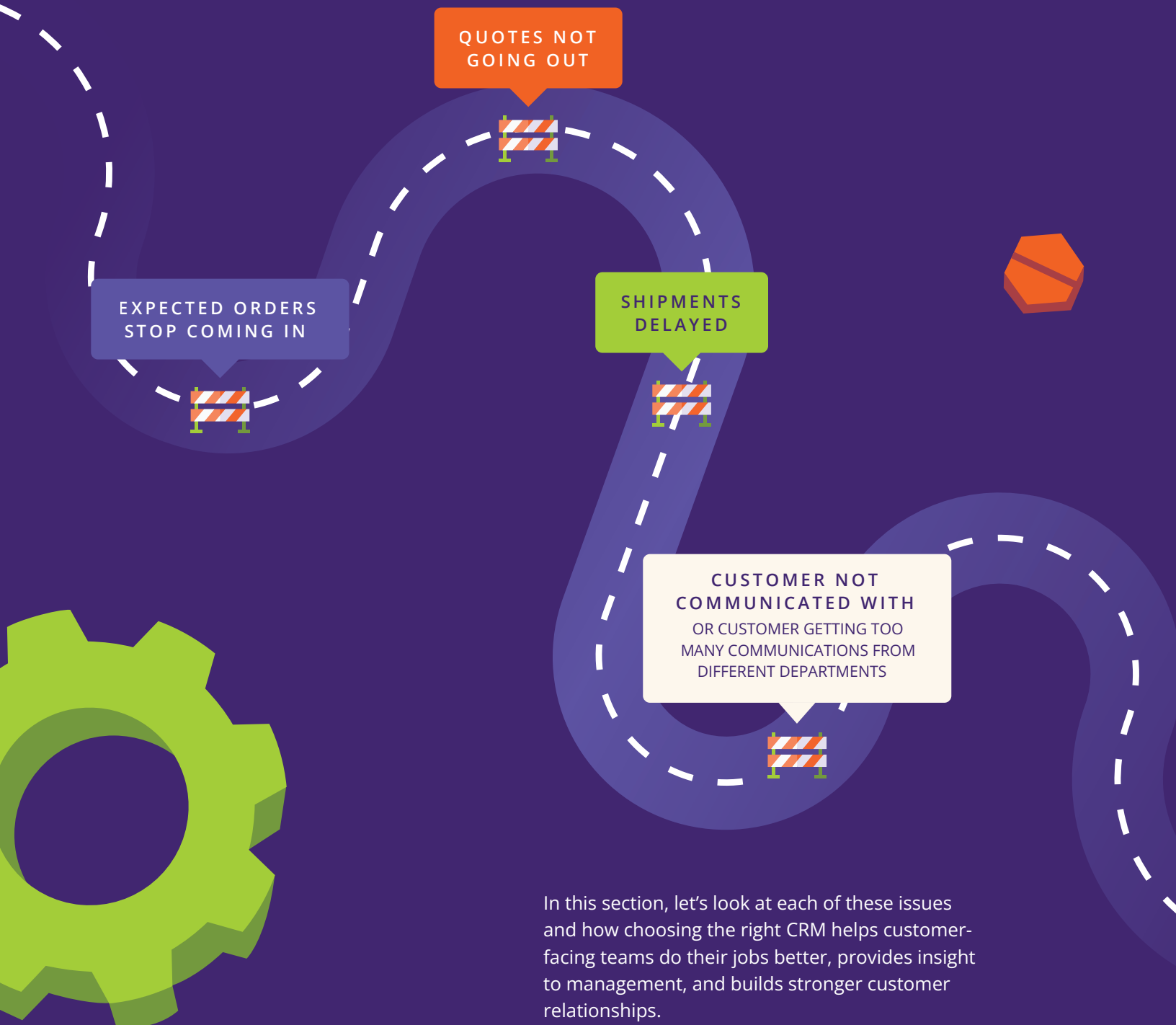
Your ERP may be a mess. There may be outdated spreadsheets that bounce between three different departments. But sales needs customer order data to do their job.

And it's actually okay if your [ERP data isn't in perfect order](#).



You need a CRM that **marries sales activity and order data**, highlighting every touchpoint from prospecting through fulfillment.

With the right CRM, you can identify changes in buying behavior and solve problems before they affect the bottom line. Here are a few examples of problems manufacturers face:



In this section, let's look at each of these issues and how choosing the right CRM helps customer-facing teams do their jobs better, provides insight to management, and builds stronger customer relationships.

01 Keep the Orders Flowing

You probably know your customers well. Manufacturing is about relationships. But do you have visibility into ongoing deals or daily customer interactions?

WITHOUT INSIGHT INTO SALES ACTIVITY, YOU'RE FLYING BLIND.

If deals aren't moving forward or orders aren't coming in as expected, you might be headed for trouble long before you're able to do anything about it.

That's where a good CRM comes in.

You need a CRM that can identify low orders and stalled quotes so your team can stay one step ahead of any issue that may arise.

Catch Low Orders Before They Cause Problems

How long does it take to find out a customer hasn't placed their regular order?

It's easy to keep an eye on new business and new sales. It's harder to notice when something is supposed to happen, but doesn't. No one makes an announcement when something hasn't occurred.

So how does the sales team know to reach out to a customer if something goes wrong? And what happens if they don't before it's too late?

Orders may slow or stop for any number of reasons, including:

- ✓ Buying from a competitor.
- ✓ No longer requires product in question.
- ✓ Going out of business.
- ✓ Changing business model.

When these things happen, you need a CRM that can alert you to [take action](#) to avoid losing revenue.



Know Where Every Deal Stands

Predicting revenue in manufacturing is like predicting the weather—it can be hard to see more than a week out so you just hope it doesn't rain.

But you can't scale a business like that. You need real visibility from prospecting through fulfillment.

Sales reps can be optimistic about potential orders. But what are the real chances of each actually closing?

You need a CRM that uses data and artificial intelligence (AI) to give you an unbiased view of what's really going on.



Stalled quotes can impact business in a number of ways:

- ✓ Orders may take longer than expected to come in.
- ✓ Opportunities to expand or grow accounts might be missed.
- ✓ Customers may look at alternatives or turn to competitors.
- ✓ Inaccurate forecasting and falling short on revenue.

To avoid these issues, you need a CRM that can accurately track real revenue opportunities and alert you when a deal is taking longer than expected.



02 Keep in Touch With Every Customer

The personal touch plays a big role in manufacturing. It's a business of relationships.

So, when something goes wrong,

...COMMUNICATION IS KEY.

It would be nice to live in a world where nothing ever goes wrong. But instead, we get to deal with a fun thing called the supply chain that breaks all the time.

It's not uncommon to be in a situation where, even through no fault of their own, a manufacturer is unable to fulfill an order on time.

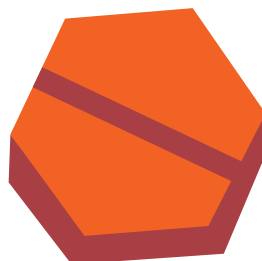


Here are a few reasons an order could be delayed:

- ✓ Supply chain issues affecting access to raw materials.
- ✓ Lack of on-hand supplies due to unexpected surge of orders.
- ✓ Issues with logistics or transportation of goods.
- ✓ Regulatory changes or complications.

Failure to reach out could result in [customer churn](#) or [damaged brand reputation](#).

The right CRM can alert sales reps that an order has been delayed so they can communicate with the customer.



03 Taking on Tier-One Customer Accounts

Every customer needs your attention. But the top tier, your biggest spenders, deserve special focus.

Does your sales team feel the same way? Or do they prefer to spend more time with their old golf buddy that lives in the same city as their favorite sports team?

If you can't see where they are, or more importantly aren't, spending their time, you've got yourself a problem.

A good CRM helps your sales team...

**PRIORITIZE THE ACCOUNTS
THAT MOST NEED ATTENTION.**

With visibility into sales activity, you can see who your reps are talking to and who they need to spend more time with.

Ensure Consistent Touchpoints for Each Customer

Keeping in touch with each customer consistently gives your team the best chance to grow accounts with new opportunities.

Stalled quotes can impact business in a number of ways:

- ✓ Issues with orders may go unaddressed.
- ✓ Additional sales opportunities may be missed.
- ✓ Personnel changes may require new contacts.
- ✓ Lack of contact may result in loss of customer.

A good CRM helps you [monitor customer communication](#) to make sure each account gets the right amount of attention.

Rather than rely on the whims of each sales rep, with the right CRM you can [take control](#) of your sales process to get the most out of each account.



Organizational Consensus:

Getting Buy-In Before You Buy

So you've decided you need a CRM. Great. Now you've got to get the rest of the team on board.

Adoption is key to the success of a CRM.

And getting adoption means getting buy-in from the team from the beginning. Make sure everyone is on the same page before you pull the trigger.

Buying a CRM can have a lasting impact on how a business is run. It's not a flick of a switch and it can affect how a lot of people do their job day to day.

Here are some of the roles that might use a CRM:

- ✓ Leadership Team
- ✓ Sales
- ✓ Marketing
- ✓ Customer Service
- ✓ IT/Operations

It's impossible to involve everyone in the decision to buy a CRM. *But you need to make sure each department is ready for the change.* If you plan to form a buying committee, be sure to include at least one actual end-user to gain their perspective.

Choose one person to own the project of choosing a new CRM.

You're probably thinking "But wait! Didn't you just tell me to involve every department?"

You need to get input from every department. But one person needs to have the final say in order to avoid committee indecision and conflict.

The decision maker could be:

- ✓ CEO
- ✓ VP of Sales
- ✓ Operations
- ✓ IT

Once you have buy-in and you have chosen your project owner, it's time to choose your CRM... but not before you hit a few unavoidable roadblocks...

Common Roadblocks and How to Move Past Them

We've all been there: you work on a project or a proposal for months. You do all the research. You present your idea to the team. And then someone raises their hand and says, "but wait..."

EVERY PROJECT COMES WITH A FAIR SHARE OF DIFFICULTIES, DRAWBACKS, AND DISAGREEMENTS. CHOOSING A CRM IS NO DIFFERENT.

There are a million reasons you might get told *"now is not the right time to buy a CRM."*

That's why we've identified a few of the most common roadblocks manufacturers encounter on the quest to find the right CRM and how you can get past them.

ROADBLOCK:

"Our ERP is a mess, let's fix that first."

HOW TO GET PAST IT:

You **DO NOT** need to *have your ERP in perfect order* before buying a CRM. This is a misconception. The right CRM will provide value right away. Think long term and get the right systems in place.

ROADBLOCK:

"We can use our ERP as a CRM."

HOW TO GET PAST IT:

It's true: some ERPs do offer CRM functionality. But it's a little like those all-in-one coffee makers that grind beans, brew coffee, make espresso, and steam milk—without doing any of these things well.

Your customer relationships are too important to rely on a *CRM with limited features* that's an afterthought to the ERP product. Your team and your customers deserve better.



ROADBLOCK:

"We lack the technical resources for a CRM."

HOW TO GET PAST IT:

We get it. Manufacturers aren't the most tech savvy offices sometimes. But in this day and age, technology can't be avoided. The good news is many companies that have no IT department at all (many of Spiro's customers included) have gotten CRMs up and running.

You can too.

ROADBLOCK:

"Our sales team is old and we need to wait for turnover."

HOW TO GET PAST IT:

When you think about manufacturing sales reps, you probably picture someone a little older who has worked in the industry for years, whose customers are also their close friends.

What you don't picture is a tech savvy gen-Z or millennial kid. Learning new software might be an uphill battle with this crowd. But that's no reason to hold off on your CRM search – it's exactly why you need one now: a CRM will help you capture data so you can *maintain your customer relationships when these salespeople leave.*

ROADBLOCK:

"We can't afford to buy a CRM and hire consultants."

HOW TO GET PAST IT:

Don't hire consultants. Buy a CRM that your team can take on from a service provider that is willing to offer support. It's a myth that all CRMs require consultants. If a system requires third party support, maybe it isn't the right system.

TIP:

Spiro's customer success team partners with manufacturers every step of the way to deliver fast and continuous value from Spiro and advise them on best-practices towards customer management across the buying cycle.



Are You Ready to Buy a CRM?

You've made it this far. You passed the roadblocks. So how do you know if you are ready to buy a CRM?

If you are in charge of choosing a CRM, you need to make sure you know why before proceeding.

CONSIDER THE FOLLOWING QUESTIONS TO MAKE SURE YOU ARE READY:

01 Are Your Business Outcomes Clearly Defined?

If you want to succeed, you have to know what you are after. Make sure you and your team have decided and agreed what you hope to achieve by choosing a new CRM.

02 Are the Key Stakeholders in Agreement?

In order for a CRM to succeed, you need to have buy-in from those who will be affected. If you buy a CRM, is your team ready to adopt and use it?

03 Have You Selected an Owner for the Project?

Remember, committees can be indecisive. You need to have a person ready to pull the trigger on your CRM selection when the time is right.

04 Does Your CRM Address the Needs of Manufacturers?

You don't want a generic system that needs consultants to configure and you don't want an all-in-one coffee machine that does 5 different things just okay. You need a CRM built for manufacturers and distributors.

Can it bring in order data from your ERP? Is it built to handle orders? Does it have alerts for things like low orders or stalled quotes?

05 Are You Buying for the Future?

Think long term. Don't just solve the problems you are having today. Think about the problems you may face in a year, or in 3 years. Consider the latest technology, such as AI.

When buying a CRM, you want to stay one step ahead of the competition.

If your answer is "yes" to all five of those questions, then congratulations! You are ready to buy your new CRM.

The path to choosing a CRM may have hurdles, but when you make the right choice, the partnership lasts much longer and the benefits will far outweigh your initial resource investment.





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