Research on the Marketing Management System of Companies Using CRM System

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Abstract. This paper first combs the information system management and the theory of application in enterprises; Then, taking a manufacturing enterprise as an example, this paper analyzes how to combine the software system with the following abbreviation of the system to help the company simplify the order management process and improve efficiency. Finally, relevant suggestions and countermeasures are put forward on how to use advanced management series and information management ideas to speed up the sales process, improve the efficiency of sales management, increase the winning rate, expand the market share, and formulate corresponding strategic planning. Make it more suited to changing market demands. Hope that the research has a reference to similar enterprises.

1. Introduction

With the development of the world economy, information and data have become an indispensable force in the business field. The advent of the big data age has brought about not only smart phones, cloud processing, and cloud computing, but also major changes in life, work, and thinking. Data mining and data analysis is not only the need of daily work, but also an important basis for predicting the future direction and formulating business strategies. In the area of commercial sales, the collection of data and the use of scientific means to exploit its value will profoundly affect every step of strategy development. And using the system to track, analyze and manage sales data will greatly help enterprises to accurately and efficiently grasp business opportunities and maximize efficiency.

We live and work in a time of massive data, and we are part of that data. How to extract valuable information from this huge amount of data and conduct in-depth analysis, assessment, integration and dissemination of the collected information to find the business opportunities, trends, and relevance hidden in the big data. In the same way, in business activities, using this information to better assist existing sales management and apply it to business prospects, timely and accurate delivery of customized and dynamic solutions according to the specific needs of customers, All this will benefit us from the advent of the big data age, but we also need to have good data insight and customer management system application capabilities.

With the transformation of information technology, management philosophy and marketing thinking, the content of enterprise informatization construction has also undergone unprecedented innovations. What businesses are concerned about is no longer the construction, communication, and integration of internal enterprise informatization. At the same time, they must also be confident. Focusing on the rapidly changing external information and understanding the dynamics of the market and competitors require companies to pay attention to the collection and analysis of external information, and integrate it with the internal information of the company to achieve internal and external cooperation and resource sharing. At present, most foreign manufacturing companies, such as, use large data to search for information related to their own industry, and use this information to use software to manage their own sales systems and information systems. Such a sales system can not only ensure the normal operation of internal data, but also can obtain many more sources of information and analysis of market dynamics through the addition of large data.

At present, most companies still use the customer management system (ie, offline system) alone.
The system is relatively closed, lacks the support of back-office dynamic data, and cannot process information in real time, resulting in lagging information, fault of business layer data sources and back-office support data. It is difficult to respond quickly to customer needs. Although the system can help the enterprise achieve the integrated management of internal logistics, production and shipping information flow, and enhance the ability of internal supply chain management, it is unable to effectively manage the most basic resources and the most important source of profit customers.

It is a closed-loop system within the enterprise. Therefore, if the integration of the two has an important practical significance: to help enterprises to change from simple data collation to intelligent business decisions, to achieve synchronization and seamless connection between the enterprise's front-end customer business connection and the back-office logistics production process. To achieve the transformation of enterprise management systems from traditional transaction processing to automated customer service, these systems have had a positive and far-reaching impact on pre-sale, in-sale and after-sale.

2. Overview of the United States Head Office System

The company's U.S. headquarters began using software and software in the year.

The system is mainly aimed at the customer management system, with customers as the center, to improve the efficiency of customer function operations by promoting more information, and to reduce the sharing of information based on manual duplicate input, telephone, fax, and mail. The current customer management system mainly focuses on the control of the market and sales links, major modules and basic skills. It mainly covers customer management, contact management, time management (also known as task management), potential customer management, sales management, call center and telephone management, market activity management, after-sales service management, knowledge management (documentation), etc.

Before the year, the U.S. head office and the system were independent of each other, if there were database updates and backups require two systems to be performed simultaneously, which is not only time-consuming but also likely to lose customers. In 2007, the company realized that through integration, it will be a key factor in promoting business success. Through this integration, the resources required to maintain and connect the two systems have been significantly reduced. Before integration, it takes more than an hour to update the system every day, and after integration, it only takes minutes; The daily synchronization of data takes minutes before consolidation, and now it takes only a few minutes to synchronize the customer data of the two systems.

3. Optimization Design of SFDC Customer Management System in S Company China

From the pre-sale point of view, it includes the organization of market events, the collection of market activity information, potential customer inquiries, the processing of inquiries, and the determination of the authenticity of information; The activities in the sales process include understanding the customer's needs, guiding and persuading the customer, making corresponding solutions according to the customer's requirements, business tendering, business and technical negotiations after winning the bid, and finally obtaining the contract.

Extending to the local application, so far, S Company China Branch is still based on the application of relatively primary project progress, and does not extend to pre-sale inquiry management, after-sale satisfaction survey, online quotation and other aspects. This is also the part that can be further designed.

Design of pre-sale customer information structure

Figure 1 is the internal procurement process of the company; We call it a summary of the seven-step sales method listed in the below figure. The pre-sale process includes information processing, inquiry confirm and further understand customer demand and seek customers' purchase intentions; Determine the customer's needs, clarify the customer's procurement process, solve the customer's budget situation; Enter the real sales stage: make quotation proposal, submit quotation, business and technical negotiation, order execution.
We believe that in the seven-step approach to sales, the first to third steps are crucial because it is entirely dependent on the business personnel to judge the validity of the inquiry based on the information provided by the customer. If the judgment is correct, the company can fully support the progress of the project with accurate material resources, materials and resources until it finally wins the success of the project. If, in the end, too many or too few business people are judged and asymmetric sources of information are missed, it is not only costs that are lost, but also valuable time and resources that could have been invested in other, more promising projects. So how do you capture all the possible project information for this step? The author thinks, can grasp from the following two aspects:

3.1 The Establishment of Market Information, Inquiry System

This includes market inquiries, the entry of inquiry information, information management, information tracking and so on. Query information comes from a wide range of sources, from daily calls, faxes, emails, customer recommendations, seminars, user meetings, exhibitions, sponsorship, advertisements, and even a customer visit. It is possible to learn about other potential customers’ procurement plans.

3.2 Marketing Activities

As another important pre-sale activity, how to manage and evaluate the effectiveness of marketing activities?

In the preparatory phase of the event, different preparations are required at the same time, such as inviting customers, producing solutions, confirming the speaker, arranging the venue, and starting the meeting. These tasks are cross-cutting, if the activities are guaranteed to have a different person in charge and at the same time to be able to function? You can use the "task" management tool in the "market activity" to track different tasks, establish project task tables for different activities, and use the time schedule to balance the smooth development of these parallel tasks.

How does the system track customer and inquiry information when it's collected by market events? Chinese teams often lack systematic tracking at this point, and relying solely on the subjective judgment of sales staff often leads to the loss of information. Therefore, we can also use the two modules of "inquiry" and "task" in the system to solve this problem. Information collected in marketing activities is followed up by the inquiry system and the establishment of a tracking task assigned to the corresponding sales staff, and is linked to the market activity that produces the revised inquiry information, when linked to business opportunities and contacts, Set up reminders and periodic circular tasks. At the same time, according to each Renwuwanzhen situation, you can evaluate and measure whether you have achieved sales goals. It can help sales staff and sales management team to determine the effectiveness of information and whether it can be successfully transformed into business opportunities. Reasonable allocation of resources.
3.3 Design of After-Sale Customer Information Structure

After the project is completed and the equipment is running for a period of time, it is entering the post-sales era, which is the period of after-sales service. The focus during this period was to continue to maintain customer relations, expand service sales and identify new procurement plans. According to the requirements of the equipment software and hardware configuration for the warranty period and upgrade maintenance in the technical plan, the information will be sent and the corresponding after-sales service business opportunities will be automatically generated, and the corresponding service sales will be developed for follow-up. The service department can also make the annual maintenance plan, spare parts service, etc. according to the different conditions of each customer to improve the customer's service experience. At the same time, the system sent out customer satisfaction surveys again after December and 24 months after the equipment was sold, investigating the maintenance of customer relations by the sales team, service team, and technical support team after the equipment was sold. And understand their equipment needs and other conditions in the coming period. This not only ensures the normal operation of the equipment, but also maintains the relationship with the customer while visiting and serving the customer, improves customer satisfaction and loyalty, and finds new sales opportunities in the upgrade and begins a new round of sales, process, To create a healthy cycle.

Customer relationship is a topic that we need to pay attention to from time to time. It can not be established overnight, nor can it be maintained by ad hoc. If you want customers to think of us at the beginning of the purchase process, it's only through active contact with customers that they identify with you, think you're one of them, and become their partner and helper. Such a customer relationship is solid, long-term.

4. Technology Application of the Company's China Branch

In line with the United States headquarters, the company's China Branch in the use of system software and the system follows the tradition of the headquarters. Due to the special nature of sales, Chinese companies also use the US system in the database, and they are consistent with the US application on the module. Since the beginning of the year, the Chinese branch has used management customer information and data, but the application is limited to the sales area and continues consistently to this day. For the management of the project, the Chinese branch will not formally begin to use it until the following year.

The database information used in China is consistent with the United States headquarters in terms of maintenance technology, so the main system maintenance work is done in the United States. The adoption of uniform management within such companies has both advantages and disadvantages. The advantage is that the use of a unified database can be based on the same module and achieve data consistency.

5. Current Problems in Application of China Branch System

5.1 Problems in Organizational Structure

At present, the main personnel of the company's use of software are regional customer managers, namely general sales staff, sales managers (including sales directors in China and sales managers in China), application technology engineers, marketing staff, and contract execution personnel.

5.2 CMR Personnel Training in the System

In the sales team, the company's management system can be said to be each and every sales Relevant personnel must master the sales tools. In each sales staff induction training, only the respective sales director or system manager introduces and uses the performance and use of each module. From the general experience of use, if you have previously understood this system, then the future application is still relatively simple and handy; For those who have never been in contact, the real use will be a blank slate.
As for the internal area of China, it is also particularly important to train business personnel in a timely manner. To do a good job of localized training and prioritize according to the actual use of local use will do little to help front line personnel to use the software efficiently double the effect.

5.3 Control Problems in Project Management in System Software

This issue needs to be addressed in the next issue of authority and the automated quotation system. It is well known that all sales processes require approval and control. This is also why the existing system sets such a strict permission problem. The main functions of the existing Chinese system are still the functions of project progress management and system submission contracts. If automatic system quotes can really be implemented, then if the process of price approval and technical approval is controlled. This is also what we need to design in the following sections.

6. Conclusion

In this article, the author mainly introduces the products, market and current sales situation of the company, and draws out the research on the necessity of system integration system to promote sales. By comparing the use of the CRM system of the company's U.S. headquarters and the Chinese branch, the problems of the Chinese branch in using the CRM system and the areas that need improvement are analyzed.

References


