CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE

ABOUT THE CLIENT

A CRM (customer relationship management) database is a resource containing all client information collected, governed, transformed, and shared across an organization. It includes marketing and sales reporting tools, which are useful for leading sales and marketing campaigns and increasing customer engagement. A client base is a company's primary source of business and revenue. A client base consists of the current customers paying for the products, or services. A client base can be identified or defined in many ways depending on the type of industry. Existing clients may also be the first to be sold new offerings.

CLIENT'S CHALLENGES

A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. Customer relationships may break down and result in loss of revenue, unless everyone in the business is committed to viewing their operations from the customers' perspective, customer relationship management system may run into five main CRM challenges: high cost, too little time, bad data quality, lack of communication, and limited technology and IT capabilities.

KEY GAPS

Lead management is the process of gathering, analysing, and managing information about a potential customer, Marketing. The marketing department in any organization plays an important role in increasing the number of sales, Reporting and analytics, Customer service record valuable customer information, but maintaining the data takes work. Agents may need to manually enter data into the system to keep customer accounts detailed and up to date. Manual data entry can pose a challenge to agents who frequently travel and may not have time to constantly update the system.

KEROL SOLUTION

The client is a global financial services group with headquarter in Tokya, Japan. They are pioneers of investment banking, investment management, and global market dealings with an integrated network spanning over 30+ countries and regions.

RESULT

Finding out about your customers' purchasing habits, opinions and preferences. Profiling individuals and groups to market more effectively and increase sales. Changing the way you operate to improve customer service and marketing. CRM software allows users to track interactions with leads and customers, helping to optimize sales processes, customer service, tech support, and marketing campaigns. CRM software is an important element in tracking your customers behaviours and needs, then pivoting to meet them.