

When it comes to *customer management systems* most small business owners confidently say “we don’t need that. Sheila in the office does that for me” and then they get on with the business of making money. yee ha.

In practice though I do see a trend towards the adoption of customer management processes using specialist software applications. The trouble is that most owners don’t have the time nor inclination to swat up on how these tools can grow the business, preferring to stick to the norm rather than get embroiled in spending their hard earned cash on software they don’t know much about.

I came across an entrepreneur one day called Bob who ran a successful business that he has built from scratch and now turned over the princely sum of £2M per annum. This individual was the owner, manager and salesman. He had an efficient sales routine of phoning up his target companies. 300 in fact that he targeted at the start of the year using his trusty card index system that sat on his desk. Using a paper tray system he would split the 300 into 12 strays and work through each tray each month. Bob was an exceptional salesman and respected in the industry.

Each week Doris in the accounts department would put on Bob’s sales orders for the warehouse to process.

One day I asked Bob what his aspirations for the business were and he told me that he planned to be the largest supplier in the UK for his product type. I thought for a moment and asked him how much more turnover he would need in order to achieve that heady status. He then thought for a moment and exclaimed that he would need to be roughly 10 times the size he is now.

So I asked Bob how he planned to scale up the business to achieve 20M turnover. *He suggested cloning himself so that he could make more calls each day*

. In practice though this probably meant recruiting more sales people to try and duplicate Bob's process.

Now before I continue I will say upfront that this is probably a very good idea but I asked Bob if he would like to reach 10 times more sales by himself without recruiting anyone, would he be interested in exploring this. Obvious answer I know, but how?

Firstly the trusty old card index and filing system will have to go and be replaced with a computer. I could see his barriers starting to rise ??**!? The 300 names would be replaced with 3000 names. The monthly cycling through of accounts will be replaced so that each of the 3000 will receive at least one message each month containing useful information and backed up by Bob calling the ones that the system identifies as an interested person or hot opportunity.

Over the next 2 years, Bob's sales grew to £5M without hiring another person. More importantly he now has a system that can be shared with any new recruits he cares to take on. Contacts can be split and shared with ease. Processes are repeatable and consistent. Quotations and Sales orders are automatically processed without the need for manual printing and data reentry so the entire operation is working effectively, costs kept to a minimum and profits maximized.

How did Bob get on with the change of culture and adoption of software? Not bad. It took a couple of months of pain to bed in the new working practices but according to Bob he says it was worth it. He looks back at his old process and laughs. However did he manage before!

CRM takes time and effort to implement but the rewards far outweigh the initial obstacles. You've just got to remove the inertia and get onto it.

* Real names have been changed