

If you're a social networker, on LinkedIn, a marketer or just in the business of selling, this article demonstrates how your relationship building activity can be harnessed and applied directly into your customer relationship management (CRM) system. Do it the right way and watch your sales grow.



A real-life example is always a good place to start and in this case study you will see the power of the LinkedIn network and how it relates to an in-house CRM system.

This is a business that sells high value capital goods. The actual company name is not important but the concept is since it can be applied to any business of this type. The sales process involves several meetings over a 3-6 month period. There can be several decision makers including the MD/CEO, Finance Controller and Sales Director. For the purpose of this exercise we'll call the company "SW Goods Ltd".

The Scenario before LinkedIn

Back at base, SW Goods Ltd enters all their sales leads and networking contacts into their in-house CRM system. The particular CRM system is SugarCRM, the world's largest Open Source CRM solution. As new sales opportunities are uncovered the details of each opportunity are entered into [SugarCRM](#). Sales activities such as meetings, demonstrations, phone conversations are logged in SugarCRM.

To summarize:

- Add sales leads and networking contacts to SugarCRM
- Enter new sales opportunities • Track sales activity

The salesman at SW Goods Ltd was working on one such sales opportunity when he hit a brick wall with his sales contact. Whatever he tried he just could not get the guy to sign up. As each day passed the deal got colder.

Now, at the time SugarCRM was an invaluable tracking and management tool. It clearly identified the stalling opportunities, it highlighted the bottlenecks in the sales pipeline (i.e. which deals were stalling and when in the process) and it helped the salesman and management to focus.

Then one day SugarCRM released a new version that included a 'Social Networking Connector'. Now the words "Business" and "Social" are two words that are poles apart and initially this new release was received with mild interest but even so the 'LinkedIn' connector was duly installed. **The Scenario after LinkedIn**

The salesman logged onto SugarCRM as usual but today a new feature is available when viewing his prospect. Immediately his world has opened up and now SugarCRM is no longer showing information that has been added by him or someone else in-house. He can see a list of employees at this prospect company that are in the LinkedIn network. It just so happened

that one of these people, the Finance Controller who he had never spoken with, was 'connected' to one of his LinkedIn contacts as a 1st level connection.

A few phone calls later and his 1st level LinkedIn contact has recommended his company to the prospect. A new relationship and advocate has been borne in the account and the sales opportunity has been reignited.

To summarize:

- Connect LinkedIn business network to your CRM system
- Select a Company/Account in the CRM system and instantly see the employees who are in LinkedIn • See how these employees are connected to 'your' LinkedIn network
- Build new relationships and advocates
- Gain wider buy-in and sell more easily

Moral: Connecting LinkedIn to your CRM system creates a true relationship building experience for business people. Without this connection your CRM system is a good, but an underutilised, internal-facing resource.