

FROM CLIENTS TO

BFFS

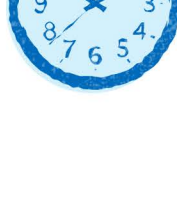
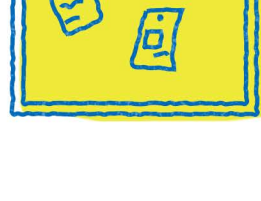


5 TIPS FOR USING A CRM TO BOOST CLIENT HAPPINESS AND AGENCY PROFITS

#1

MAKE A GREAT 1ST IMPRESSION

The first impression defines the relationship. The better that first line of contact, the more likely the customer will stick around. And if they come back just two or three more times, they have a 54% chance of making additional purchases. A CRM makes the initial communication seamless, creating a great first impression and lasting relationship.



#2

AIM TO BE THE BEST VERSION OF YOU



Your agency's direction, organization and culture can often be neglected in the bustle of client service, but a healthy agency is a major reason clients will stick around. Utilizing a CRM streamlines and structures your client relationships, relieves stress, and even encourages better cross team collaboration. Then, when your client needs you, they're getting the best you.

CUSTOMER SATISFACTION INCREASES BY AN AVERAGE OF 47% WHEN BUSINESSES SWITCH TO A CRM.



#3

UNCOVER OPPORTUNITIES BY PREDICTING THEIR NEEDS

Understanding the client's needs is one of the most valuable components of building a relationship with them. Getting insights into their current health, in order to predict future opportunities, is important when finding ways to best serve them. Through the features of a CRM, you'll be able to gain a window into every datapoint of the customer journey. From access to a centralized database for storing client information, to sales pipeline visibility, you'll begin to understand the client's desires, and how to fulfil them.

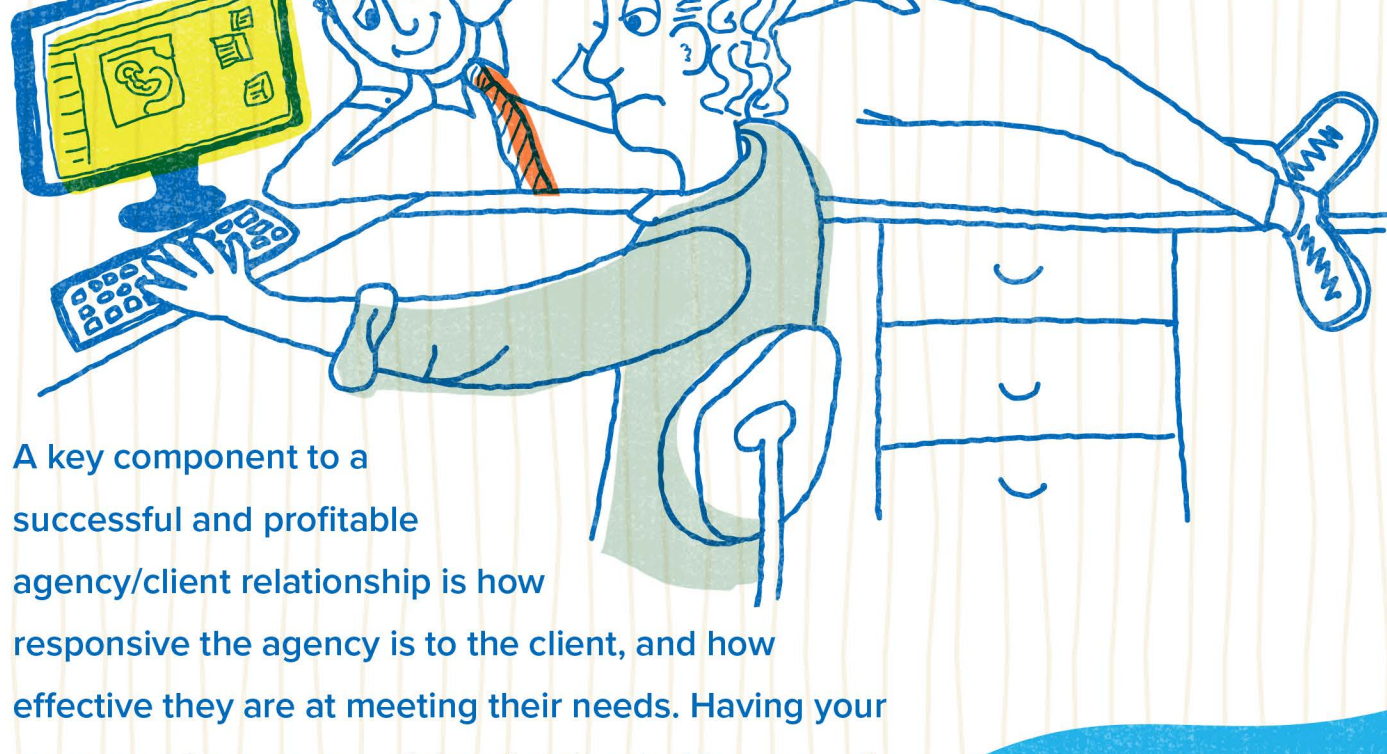


PERCENT OF BUSINESSES THAT SAY THEIR CRM SOFTWARE ALLOWED THEM TO HAVE GREATER ACCESS TO CUSTOMER DATA.

74%

#4

SHOW YOU CARE BY ALWAYS BEING THERE FOR THEM



A key component to a successful and profitable agency/client relationship is how responsive the agency is to the client, and how effective they are at meeting their needs. Having your team members on top of the client's priorities, as well as coordinating and scheduling regular contact with them makes all the difference. A CRM helps streamline the process with automated reminders for regular contact, calendar sync to the system, as well as a viewpoint into what your colleagues have been working on, in order to assist their processes.

#5

IMPROVE YOUR RELATIONSHIP BY BUILDING TRUST



Being in closer, more coordinated communication creates trust, and relationships thrive and last on trust. In a sense, they grease the wheels allowing much more to get done and accomplished. By tracking leads and clients, managing their pipelines, and nurturing them along the way, you'll begin to see how catering to your customers creates a tighter bond. And the tighter that connection, the more satisfied they'll be—allowing your business to grow.

PIPELINEDEALS IS A GREAT TOOL FOR CLIENT/CUSTOMER MANAGEMENT ... IT HAS BEEN A TREMENDOUS HELP KEEPING CONTACTS AND SALES GOALS CURRENT.

Mike English of Ebsco Creative Concepts

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