



Email and Group Calendar Considerations in a Successful CRM Implementation

Email Considerations

How you will manage your corporate email once you add a CRM to your business is a very important and potentially difficult decision. Some of the considerations are:

- Like Calendar information, emails within a separate system like Outlook can never help you to position the email exchanges within the larger CRM context, or become an easily accessed part of account history.
- Your staff is presumably already using an existing tool to access their email, and may be unwilling to learn a new system.
- You don't want to stuff your CRM with emails. You only want emails to and from clients or potential clients, not personal emails, and not a lot of the intra-office emails. You only want emails that are still important and relevant history for each client's current situation. Too much data in your CRM may create a situation where useful information is hard to come by.
- It can be very handy to send email from within your CRM. From the screen showing details for a particular client, it is a real time-saver to just click on *Compose Email* and send off a short email, knowing it is automatically addressed properly, and automatically becomes a part of that client's history in the CRM.
- CRMs are useful places from which to perform email campaigns as well, as they have all the right information within them, and you'd like to track as part of each client's history which campaigns they have been exposed to, and track the overall effectiveness of each campaign.
- CRMs are not email servers. You can bog them down if too many people store too many emails in them. For a typical business with perhaps 50 employees and 1000 clients, you should aim to keep the number of emails within the CRM below 100,000, and certainly below 200,000. To do this it can be very handy to have some facility in the CRM, as there is in **CRMonCall**, that automatically removes emails when they get to a certain age.

The end result of all these factors is that most commonly, our optimal recommendation for most businesses up to 250 employees is to adopt the following solution:

1. Users should keep using their current email client for day-to-day email.
2. Link their email client software to their email server using the IMAP protocol.
3. In each user's email client, create a folder called CRM. Because of how IMAP works, this will create a CRM email folder on the email server for that user as well.
4. Every time a user has an email they feel should be filed in the CRM, they drop a copy in the CRM folder within their email client.
5. Again, because of how IMAP works, this will put that email in the CRM folder for that user on the email server.
6. Configure **CRMonCall** to retrieve email using IMAP from that email account for that user - not from folder INBOX, but from folder CRM (this is the key to this approach!). Do this for all users.
7. Now - every email that is dropped in the CRM folder in any user's email client will turn up in the CRM automatically - and will be automatically linked to any related leads, contacts or accounts, as well as to the user that filed it in the CRM.
8. Users are free to use the CRM to send emails to customers. Records of campaign emails are only kept within the CRM, but to make sure that other individual emails composed within the CRM and sent to customers are also filed within the user's normal email client, the CRM should be configured to blind copy to the user's normal email account every individual email sent out from the CRM. (**CRMonCall** has an Auto-Bcc option you can set to do this.)

www.crmoncall.com



Implemented properly, this solution addresses every one of the initial considerations for an email solution, and obviates the need for any messy, administratively intensive, and sometimes unreliable email client plugins.

While Outlook and ThunderBird email client plugins are available to integrate to **CRMonCall**, we still strongly recommend the above solution be implemented whenever possible. You will need to examine your organization's requirements and decide if you are in a position to act on these recommendations. For organizations currently using Outlook, there are frequently user concerns about the migration to the use of a CRM. Outlook can be used for EMail, Calendar, Contact Management, and Task Management. Our recommendation is that in all cases, Calendar, Contact and Task Management be transferred by all users into the CRM. Email can (and usually should) remain in Outlook, with the above scenario implemented.

One remaining concern is the contacts each user has in their email client's Contacts Folder - especially the contact names and email addresses, as this data controls the user's ability to send emails easily from Outlook, Thunderbird, etc. There are a few ways to accomplish this:

- Use a feature in **CRMonCall** which can export bulk contact data as a block of vCards. This data can then be imported into the user's Outlook client - either one by one using the Outlook interface, or in bulk using a free tool such as vCard Magic. Existing records can be updated this way, and this also reliably keeps each user's private contact data from entering the CRM, which can be a problem when using an Outlook plugin.
- Use the SyncMe add-on module which offers the ability to sync each user in the system to their smartphone, and to Outlook.

For organizations currently using Mac computers, users can use the Mail email client and pursue the same CRM folder strategy as outlined above. The local iCal Calendar can subscribe to the user's calendar in **CRMonCall**, which is a handy feature. Or they can use ThunderBird, and the plugin for **CRMonCall**. Mac clients can also use the bulk vCard export feature to export bulk contact data to a block of vcards - and then import them into the address book application, which makes all of them available within Mail as email addresses. So that gives the user contacts, calendar and email integrated between **CRMonCall** and the Mac client software. (Note that **CRMonCall** also supports the use of the Safari web browser found on the Mac.)

Group Calendar Considerations

Your CRM is almost certainly the best place for you to enter all your appointments, meetings, scheduled calls, and planned tasks – all the business activities which have a time and/or date associated with them. Not only does entering this information in the CRM help to associate the activities with the related accounts and contacts, helping to generate accurate account history, but the CRM provides a groupware environment for scheduling meetings that is aware of the all the scheduled activities for everyone in the company.

Prior to adopting a CRM System, many small and medium businesses use Microsoft Outlook, Outlook Express, and/or Microsoft Exchange to fulfill their corporate calendaring needs. Other popular solutions include Lotus Notes, Novell GroupWise and many other groupware products. While Outlook is a reasonable solution for calendaring for an individual, and Exchange helps to link together calendars across a business, this solution can never help you to position these activities within the larger CRM context, and automatically generate and track account history.

If all this talk of Outlook and Exchange, Lotus Notes, Outlook Express, etc. is all foreign to you – don't worry. They are simply other ways of addressing needs that your CRM will satisfy nicely, and satisfy more effectively from the perspective of managing relationships with your customers. Sometimes a counter argument to using a CRM for calendaring is that for many CRMs the synchronization options for linking

www.crmoncall.com



the data in smartphones like iPhone, BlackBerry and Windows Mobile devices to your CRM data can be severely limited or non-existent. If mobile access to calendar information is important for your firm, check out your synchronization options before making the move to CRM-based calendaring.

CRMonCall has the ability to sync its calendar information with Apple's iCal, and with the Google calendar, and frequently one of these options, or solutions like MobileMe for Mac users, can then get your calendar data onto your mobile device. **CRMonCall** also has the info@hand Mobile feature which provides web access to **CRMonCall** specifically formatted for iPhone, BlackBerry and other mobile devices. As well the SyncMe add-on module offers excellent smartphone direct wireless sync to the **CRMonCall** server.

Our recommendation to CRM users is to stop using Outlook and its alternatives for calendaring – and centralize this function into the CRM System. But ultimately you must decide if adopting **CRMonCall** for your corporate calendaring requirements is an approach that suits your organization and its people.

Final Thoughts

As you can see, a variety of factors impact the eventual success of a new CRM System deployment. CRMonCall.com has years of experience working with companies in a broad range of industries. CRMonCall was chosen as a premier North American distribution and hosting partner for Info@Hand, The Long Reach Corporation's flagship CRM product line. With the combination of The Long Reach Corp's vision and leading-edge development expertise coupled with CRMonCall's national customer support presence and proven system implementation process... your organization can be assured your investment will reap rewards for years to come.

CRMonCall.com is not your typical CRM solutions provider. Unlike many solution providers in this space, what distinguishes us is the fact that we are a Company of... first, business professionals... then technology specialists. Yes, we have technology skills galore, but as importantly, the CRMonCall team has broad experience in a variety of functional business areas in their past corporate or entrepreneurial lives. As such, we're able to partner with our clients and often bring fresh insights and approaches to the table as we implement our leading-edge solutions. We've purposely crafted a business model which is structured to assure our success hinges on our client's success. Feel free to contact us to coordinate a no-obligation discussion around your company's CRM needs.

www.crmoncall.com