

# 2022 State of CRM report

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Why optimisation of your CRM system is key



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Today, CRM systems are commonplace amongst most organisations. So much so that compared to two years ago, their usage remains largely the same suggesting they have plateaued somewhat. Implementing them isn't the focus, it's getting the most out of them for your business. Maximising the output.

81% of executives<sup>1</sup> noted that their CRM system is instrumental in their ability to deliver seamless customer experiences. This stat alone highlights a clear area of focus for businesses and paints the picture for this report.





# What are the four key areas to optimise for a better customer experience

1

Well integrated CRM systems transform business resiliency through a pandemic

2

Shared CRM systems create harmony amongst different departments

3

Employees see a single source of truth as the key to a great CX

4

AI powered automation is the future of CRM



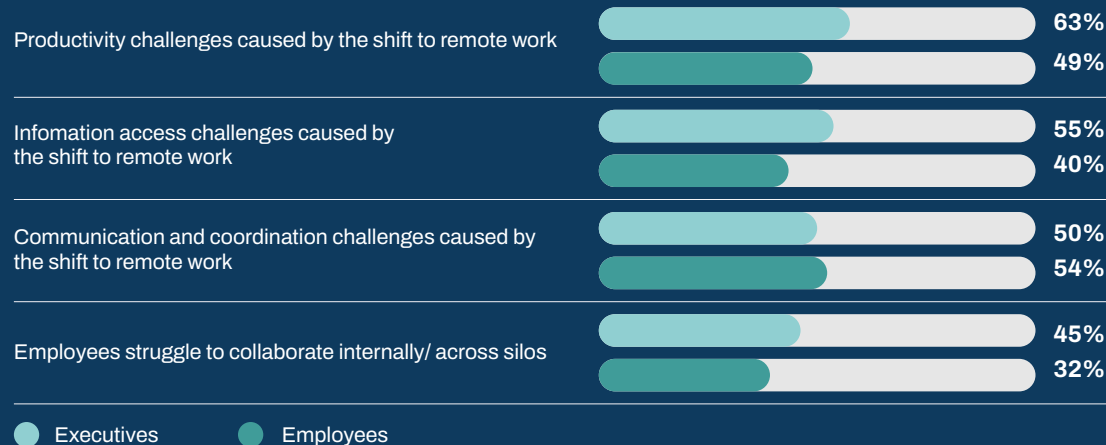
# Well integrated CRM systems transform business resiliency through a pandemic

CRM systems have become central to providing insight on performance and business growth. However, the reality is that many businesses don't have sufficiently integrated systems.

In fact, 57% of executives were unable to maintain their customer engagement levels during the shift to remote work because their CRM systems were not well integrated and accessible.<sup>2</sup> Therefore, 57% of businesses weren't able to maintain the same levels of CX. This will lead to customers looking elsewhere causing a drop in sales and ultimately a loss in revenue.

With remote working now a mainstay and flexible workplace policies expected, it's more important than ever for businesses to ensure employees can work with the same productivity from home.

## "What are your organisations' biggest employee experience (EX) challenges?"<sup>3</sup>



These challenges highlight the importance of needing a well-integrated CRM system. If your employees cannot access relevant information and the communication between departments has decreased, productivity will fall. Over time this will be reflected externally to the customer, leading to a negative impact on the CX.

Regardless of where your employees are working, they must be able to continue to deliver an excellent CX for your customers.



# Shared CRM systems create harmony amongst different departments

Many businesses still tend to only use CRM systems for two fundamental processes:<sup>4</sup>

1. Collecting basic account and contact information
2. Using a digital first approach for sales, service and marketing

This isn't utilising the system to its full capabilities. Companies should be embedding CRM systems to become a critical component of all teams' processes and in turn, a key part of the customer lifecycle. By extending cross-team adoption of your CRM system, businesses can improve data availability and allow better data driven decisions to be made. Not only will this increase consistency internally across departments to adopt more personalised content but also increase consistency externally to the customer across multiple channels. Those that do are 14% more likely to provide exceptional CX, as shown below:

"On a scale from 1 to 10, how would you rate the overall experience your company provides to its customers?"



● All teams using CRM ● Some teams using CRM

Fragmenting the use of your CRM system throughout departments ultimately has a negative impact on the customer experience. Be sure to optimise its use internally, creating harmony, and you'll provide a more personal and relevant journey in line with your customer's expectations.



"When all teams use CRM, they are 16% more likely to feel it supports the full customer lifecycle."<sup>6</sup>



# Employees see a single source of truth as the key to a great CX

Siloed usage of your CRM system also leads to a further issue - your teams struggling to make use of the data they have because it's so fragmented. Only 27% of employees feel that their CRM system is a single source of truth.<sup>7</sup> And on top of that, a whopping 94% of employees say that a single source of truth would create value for their organisation.<sup>8</sup>

As companies become more data-driven, CRM systems, as the single source of truth, are key to empowering customer teams with the right insights and data-driven approaches to customer relationships. Without a single source of truth, departments struggle to understand and engage with customers at speed with relevant materials. And as a result, businesses cannot create great CX, leaving their customers turning to competitors.



**“70% of employees say that customer/prospect and account data comes from too many sources to easily make sense of it.”<sup>9</sup>**





# AI powered automation is the future of CRM

When evaluating what area of the CRM system is most important to businesses, advanced capabilities such as AI and automation has jumped from 33% in 2019 to 42% in 2021.<sup>10</sup> Now ranking as the highest use case planned for investment. This statistic highlights the change where businesses are now focusing their attention:

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**"When evaluating CRM systems(s) which of the following criteria are most important to your organisation?"**

Advanced capabilities (e.g artificial intelligence, automation)



2021 2019

These advanced capabilities allows businesses to offload repetitive actions from employees and focus on more important areas such as:

- AI to guide CRM users through the best actions and conversations
- Journey analytics and customer intelligence to improve customer understanding
- Visual technologies and mixed reality to enable more effective customer engagement
- Collaboration tools to facilitate group work
- Cloud platforms to provide extreme scalability



**79% of organizations will be using AI-powered automation to enable easier customer/ prospect engagement by 2023.<sup>12</sup>**



# Invest time in your CRM system and reap the rewards

So, research shows that your CRM system needs to be a critical component of your core processes. However to utilise it's functionalities, you must invest the time in your team.

Employees themselves understand this. When asked what would make their CRM system more effective:

- 53% said better on-boarding and training
- 47% said better data availability and use of our CRM systems across different departments



Ultimately a more effective CRM system will lead to the following:

1

Create more  
value for your  
organisation

2

Increase volume  
of sales or  
higher-value sales

3

Improve  
customer  
satisfaction

4

Improve  
customer  
loyalty

5

Create more  
effective cross-sell  
and upsell  
opportunities





## References

- <sup>1</sup> Forrester State of CRM Aug 2021 page 12
- <sup>2</sup> Forrester State of CRM Aug 2021 page 5
- <sup>3</sup> Forrester State of CRM Aug 2021 page 7
- <sup>4</sup> Forrester State of CRM Aug 2021 page 8
- <sup>5</sup> Forrester State of CRM Aug 2021 page 8

- <sup>6</sup> Forrester State of CRM Aug 2021 page 12
- <sup>7</sup> Forrester State of CRM Aug 2021 page 9
- <sup>8</sup> Forrester State of CRM Aug 2021 page 4
- <sup>9</sup> Forrester State of CRM Aug 2021 page 1
- <sup>10</sup> Forrester State of CRM Aug 2021 page 17

- <sup>11</sup> Forrester State of CRM Aug 2021 page 17
- <sup>12</sup> Forrester State of CRM Aug 2021 page 16
- <sup>13</sup> Forrester State of CRM Aug 2021 page 12
- <sup>14</sup> Forrester State of CRM Aug 2021 page 14





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