

THE IDEA *in brief*

The Customer Relationship Management (CRM) market is crowded, but working your way through the options can help manage growth through transparency & tracking.



As the construction industry returns to growth mode, many ASA Chicago (ASAC) members are evaluating various Customer Relations Management (CRM) platforms to drive processes, increase revenue and save time.

One example is **ASAC MEMBER ROYAL CRANE**. We caught up with VP of Sales **DAN BARTON** recently as he shared Royal's experience. Here are some excerpts from our Q&A.

ASAC: What challenges led Royal to purchase a CRM system?

DB: We had the feeling we were leaving a lot of money on the table when it came to estimates and follow ups. When you send an estimate out for a bid that is 3-4 months down the road, and then jump right into another project after hitting 'send', you have a good chance of forgetting about it without the proper reminders.

Which CRM products & companies did you consider?

We looked into a number of solutions—software based such as ACT, and cloud-based like Sugar CRM and Salesforce.

Other than price, what were the primary factors you considered?

Transparency and ease-of-use were the two biggest factors other than cost. We had to have something in place that would be relatively straightforward in implementation as well as the training of our staff. With regards to transparency, we needed something that would make it easy for management to track and review all inside and outside sales activity to avoid the constant "What are you doing?" conversation.

What's the primary way Salesforce.com will help Royal?

We know this system will help us organize all our call and customer data, improve our staff's follow-up, and help us organize and build a pipeline of information for future work.

Why did you choose Salesforce.com?

We chose largely due to the closeness of features with the price of the system overall. It hit on everything we were looking for to get started, and wasn't very difficult to put in place at all. The most difficult part of launching the system is teaching your employees a brand new process and making sure you're providing solutions to them in a timely manner.

What is the subscription rate per month?

Subscription rates run anywhere from \$25/month per user up to \$300/month per user—and that is all dependent on the features you choose. Each tier has different features available, and you just need to review your needs vs. your wants. It is very affordable when you consider that against a couple of sales or orders you wouldn't have gotten without it, or the time you've saved in tracking your data.

What advice do you have for ASAC members as they begin to implement a CRM system of their own?

Have patience, start small, and don't bite off more than you can chew. We started with the basics, and the plan is to introduce a new feature or method a few times over the course of a year. Once the foundation of the system is mastered, I think it isn't as overwhelming to learn one or two new features, rather than try to lump them in at the start and risk them getting lost.



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