The 5 Customer Interactions Small Businesses Should Track in CRM

essentials.salesforce.com/resources/5-customer-interactions-small-businesses-track-crm

Technology gives small business owners an unprecedented ability to monitor customer relationships. Every call, every support ticket, even every website visit can get tracked and folded into the customer's profile.

When your business grows its customer base, however, having that much data can start to feel overwhelming. How much of that customer data is valuable to the sales process, and how much of that customer data is noise?

This guide is for small business owners who need to know what essential customer activity they should track. Here are the five types of interactions that should get logged in your CRM.

1. Calls, meetings, and emails

It's through your conversations and your interactions that you build relationships with customers. This is why it's worth logging each of those. Cumulatively, they give you an overview of each customer relationship.

The trick here is understanding how many of these interactions you need to log. In most cases, very little information needs to get tracked in your CRM. Generally, you need to track the following from these interactions:

- When the conversation happened, if it was a meeting or a call.
- What you discussed.
- What next steps, if any, followed from that interaction.

As an example, imagine a real estate agent who is working with a young couple looking to buy their first house. The couple has been exploring the real estate market and already looked at a few houses, but the houses they like best are too far above their budget.

Now, imagine one of those dream homes comes down in price. The real estate agent will probably call the couple to let them know about the opportunity and, if the couple is interested, could set up another viewing.

From this interaction, the real estate agent would log the call, when they made the call, and whether the couple agreed to set up another viewing of the house in question.

That's not a lot of information, but it's just enough to let the real estate agent know whether the customers are in a position to move closer toward a purchase.

2. Your follow-ups

Log your follow-ups simply to keep yourself organized.

This is easy information to lose track of. When your day is full of tasks and meetings and calls, you might forget to log a follow-up call.

Imagine you had called a prospect the previous day and left a sticky note to yourself to follow up. You saw the note the next morning and immediately followed up with the prospect. All good so far.

But then imagine you forgot to log the call, went to lunch, came back to several imminent tasks, then saw that sticky note again and repeated your follow-up.

If you have a good relationship with that person, you might be able to laugh off the gaffe. In the majority of cases, though, that follow-up risks disengaging or outright annoying a prospect.

Log your follow-ups to keep yourself organized, and then you can count on CRM to keep you on task—even on busy afternoons when those tasks seem to pile up endlessly.

3. Quotes and proposals you send to the customer

Quotes and proposals are also important to track for the sake of staying organized.

Imagine you've grown your business to the point that you have several proposals under consideration from multiple clients. You will need a place to track all of those outstanding proposals, and there are several benefits to doing so:

- **Preparation**: As negotiations progress, you will be able to visualize how many proposals are close to becoming deals. This helps you prepare accordingly for any new projects and work that results from those sales.
- **Relationship Management**: If you have done business with a customer over several years, it's helpful to have a record of all the quotes, proposals, and scopes of work you've negotiated with that customer. When you have that history available and at hand, you will be able to price future work in line with quotes you've given in the past.

Over time, too, you will learn each customer's nuances. Imagine an independent management consultant, for example. That person's work can differ greatly from customer to customer. Some of their customers might be very hands-on and require multiple planning meetings at the beginning of a project. Some customers might be less hands-on and even slow to respond to outreach.

By tracking proposals, quotes, and scopes of work, that consultant will get a feel for what time, energy, and people resources are needed to manage each customer's needs. Each subsequent proposal, then, will be a little more accurate and more reflective of the work that will go into each project.

4. The customer's past purchases

For any business, one of the most important things to track is each customer's previous purchases. Knowing what a customer buys can tell you what's important to them, and it can also help you anticipate future purchases.

For example, imagine you're a professional photographer who specializes in portraiture. People from all around reach out to you for everything from modeling portfolios to LinkedIn headshots to corporate photos.

Now, imagine one client is a publicly-traded corporation that has to publish quarterly and annual reports. Each year, for the annual report, the board gets together for a photo, which is published in the report.

By knowing that there is a demand each year for this board group portrait, you can set aside time to be sure you're available for that shoot.

What's more, you also see opportunities for more work. Perhaps each member of the company's board and the executive team would like a portrait for the company website, for example. When you reach out to plan the group photo, that would be a great time to pitch those additional services, and perhaps even bundle all the work into a single shoot.

5. Their inquiries and support requests

Customers frequently have questions about products, and sometimes they experience hiccups in the delivery or performance of something they've been sold. That's a normal part of doing business.

Track each of these on a per-customer basis. This way, you will create a record of every question a customer has and every problem that has come up in the course of your doing business with them.

These might be some of the most information-rich activities you track in CRM. Be sure to note the following:

- What the customer's question or support request was about.
- How their question or concern was resolved.
- How quickly you resolved the problem.

Be specific and detailed regarding the customer's issue. If a customer phoned you up to say that a product shipment was behind schedule, note what you did to identify the problem, what you had to do to solve the problem, and what steps you took to ensure the problem won't happen again.

By being detailed in your note-taking here, you will have great insights into how responsive your company is to customer concern. Few things can forge a stronger relationship than quick, decisive solutions to a problem.

By focusing on these five activities, you will create a solid foundation for monitoring and managing your customer relationships. As the number and complexity of those relationships grow, your diligence now will pay dividends in the future.