



CRM: THE CONSTRUCTION MARKETING GUIDE

For Your Building Product Businesses





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WHAT IS A CRM SYSTEM?



What Is A CRM System?

So, what is CRM all about? You've probably heard this term time and time again amongst the list of jargon you hear daily. But a CRM system is much more than just another piece of jargon.

A high-quality CRM (Customer Relationship Management) can empower you and your building products business to understand your prospects, sales data, and marketing like never before.

A CRM system refers to software that helps you keep track of interactions with future and current customers and clients.

Long gone are those lengthy spreadsheets with data scattered from inboxes, filing cabinets, and endless pieces of paper.





CRM For Your Building Product Business

And such a migration could be painful if the decision has been put off a few too many months, or even years.

CRM is not just useful to large building product companies - it's essential for businesses of all sizes.

The goal of implementing a CRM is to create a system that your sales and marketing teams can use to interact with prospects or potential leads more efficiently and effectively.

WHY DO I NEED A CRM?



Why Do I Need A CRM?

Do you need a CRM? the answer, in short, is any company within the building products industry that wants to grow would benefit from implementing a CRM system.

If you're a B2B business that usually tracks leads and customers over lengthy sales cycles – you can benefit.

If you're a B2C company selling building products directly to customers – you can benefit too.

CRM is vital for efficiency. Without one, your team will end up searching through emails to make connections.

This may have a risk of failing to follow through with a key task which may be essential for lead nurturing.

Working Smarter

Construction sales managers want to find out what upcoming jobs they have and if the person who has this information is on-site – this can be difficult.

By hunting through files for this information - you can lose valuable customer information.

Be smarter and adopt a CRM. It can save you money by using time effectively to better target your customers to then gain more sales. IS MY BUILDING PRODUCT BUSINESS RIGHT FOR A CRM?



Is My Building Product Business Right For A CRM?



The short answer is that any building product company that seeks to maintain a relationship with potential leads can benefit from using a CRM system.

A way to understand whether a CRM system can help drive your business is to think about the challenges that CRM systems aim to solve:

• Do you have a need for maintaining a central list of information on your leads and prospects? Does this information live in many different places?

- Are your prospects regularly interacting with multiple people on your team? How does everyone keep track of where the conversation with a particular customer left off?
- Do you struggle to understand the productivity of your sales team? Does your sales team follow, or need to follow a structured process?
- Would you like to see how your prospects interact with your online presence, seeing which pages they've visited and those that have interacted with your email marketing?

If you answered yes to any one or more of the above questions, chances are your business could benefit from a CRM system.

5 WAYS A CRM WILL IMPROVE YOUR SALES AND MARKETING



5 Ways A CRM Will Improve Your Sales And Marketing

There are many things a CRM can do that should get marketers, salespeople, or building product business owners pretty excited!

Here's how a CRM can make you a more effective marketing and sales machine...

1. A High-Quality CRM Provides Efficiency

A CRM system initially can be timeconsuming when adding data and records.

However, if you have one that is integrated with your email and website, your records will be populated automatically, without you having to do anything – making your life easier.



2. Automate Your Marketing Efforts

Automation allows you to eliminate repetitive admin tasks. Having your workflows set up properly can act as another member of your team keeping a check on everything.

The time you save from this can then be better utilised by reaching out to qualified leads and helping customers.

You can schedule your social media content in bulk and integrate data from different social platforms so you can see which has the most engagement.

You also can automate your emails to send weekly newsletters, reply to form submissions and send follow-up emails.





5 Ways A CRM Will Improve Your Sales And Marketing

3. Improve Your Relationships

By integrating a CRM system with your website, you can improve relationships with your contacts by understanding how they interact with your business.

It can tell you which website pages your prospect has visited, how many times they viewed that page and a live notification of when they are browsing.

You can also see when a prospect has opened an email even after you've sent it.

This not only gives you a huge insight for sales purposes but allows you to interact with your contacts at the right time. This could be the difference between winning or losing a sale.

4. Enhance Visibility Of Your Sales Pipeline

It's scary to think that there are businesses generating sales, but they can't link it back to specific interactions. By knowing what works, you can do more to grow your business.

Having your sales pipeline integrated with your website and your marketing activities can show touchpoints customers have made.

You can view:

- A deal setup
- The contact associated with that deal
- Pages they've visited
- Forms they've filled in
- Emails they've read
- Links they've clicked within an email

5. A CRM Can Be Free

A major plus. A CRM can cost you a grand total of £0. Of course, there are different packages available that provide deeper insights and advanced tools.

Yet, there is so much you can already do with a free CRM system.

An example of a great free CRM system is – HubSpot.

Just some of the tools included in the free version are:

- Reporting dashboard
- Company insights
- Tracking deals

- Email tracking
- Meeting scheduling
- A website live chat

8 MUST-HAVE CRM FEATURES



Before all else, a CRM system should be useful to the end-users of your building product business.

CRM systems have a range of functionalities, but these eight features are must-haves for any building product business that is aiming to organise their systems and improve their efficiency.

1. Contact Management

Something that all CRMs will allow you to do is create contact records and store prospect information in a database. However, for the ultimate CRM system – search for one that works to truly streamline contact data entry as much as possible.

Judge this feature with ease of use in mind.

2. Deal Stages

Whether your company has 2 deal stages or 20, you should be able to program these into your CRM system and attach associated values.

It should be simple to move a deal along the sales process, from one stage to the next. In HubSpot CRM, progressing a deal is as simple as dragging and dropping:

🎾 Contacts -	Conversations - Marketing -	Sales	 Service - Automation - 		Reports ~	۹.	🖡 📔 🧕 Hūdīgital 🗸
Deals					Table Board Search for a deal	Q Actions *	Import Create deal
All deals	NEW	3	TALKING	2	MEETING 3	PROPOSAL 2	CLOSED WON
Pipeline Sales Pipeline	\$16,500.00 Marketing Services Close date: December 31, 2019		\$5,000.00 Marketing Services Close date: December 31, 2019		\$50,000.00 Marketing Services Close date: December 31, 2019	\$8,000.00 Marketing Services Close date: December 31, 2019	\$32,000.00 Website Close date: April 23, 2019
NI deals Options * + Add filter	\$6,000.00 Marketing Services Close date: December 31, 2019		\$12,000.00 Marketing Services Close date: November 30, 2019		\$5,000.00 Marketing Services Close date: December 31, 2019	S28,000.00 Website Close date: August 31, 2019	\$7,000.00 Marketing Service Close date: March 1, 2019
	\$5,000.00 Marketing Services Close date: December 31, 2019				\$7,500.00 Marketing Services Close date: December 31, 2019		
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3. Daily Dashboard

Your sales team will need visibility to metrics such as: how many deals they have in their pipelines at which stages, and what outstanding tasks they need to complete.

Building product business owners will need to view these categories effortlessly.

Evaluate this function based on visual appeal and simplicity.

4. Task Management

Commonly, a salesperson jumps back and forth between several different systems to view and complete their daily tasks.

This is unnecessary and can in fact elongate tasks.

CRM systems that include task management capabilities streamline salespeople's daily workflow and help them keep on top of their follow-ups.





5. Content Repository

To save time when it comes to searching for content, look for a CRM system with an embedded content repository. This will allow salespeople to save go-to collateral in one place.

And that's not all - writing an email copy can be another time wasting activity for a busy salesperson.

Look for a system where you can file customised email templates, streamlining workload for the sales team.

7. Mobile

Limiting your sales team to a CRM system that can only be accessed via laptop will frustrate them, especially if they're in a role that requires travel.

Most CRM systems today allow salespeople to log on from mobile devices such as tablets and smartphones.

Make sure the ones you're considering do as well.



6. Reporting

A CRM system is only as good as the insights it provides.

Be sure that your CRM provides reporting features that make it easy to see trends and make better decisions for your building product brand.



8. Automation

You can make your life easier by automating your workflow. You'll need CRM software that allows you to set up custom rules and sales information to drive productivity in your construction team.

Essentially a workflow will allow you to automate simple and complex business processes based on triggers that you set.

You can even send follow-up reminders for your sales team to call potential prospects back.



WHAT CRM SYSTEMS ARE OUT THERE?



What CRM Systems Are Out There?

When it comes to searching for the best CRM system for you, it depends on how big your building products business is right now, and how you're looking to scale.

It varies on the specific functions you're looking for.

Adding extra features, such as marketing automation, sales and contact points – will naturally be more expensive.

However, the benefits you'll get from this are valuable, you're able to scale and everybody in your construction company can have an input.

Since there are so many options on the market, it's important to recognise what will work for your unique building product company, whether your company is **small**, **medium**, or **large**.





What CRM Systems Are Out There?

When looking at <u>G2 Grid® for CRM</u>, we can see which CRM systems are recommended and are the best performers.

Small Building Product Business

For your small building product business, we recommend Zoho.

It's an on-demand CRM system software designed to manage sales, contacts, marketing, and customer services.

Zoho is simple to use, reviews have seen a common theme regarding how straightforward the CRM is to use. It's great if you're new to a CRM system and when aligning sales and marketing.

It's a compatible tool it works well to manage leads/customers across different Zoho apps. However, you'll need to implement these Zoho tools initially.

Medium Building Product Business

For your medium building product business, we recommend **HubSpot**. It's a popular CRM system and it's well-known for its marketing automation capabilities.

There's a good reason for its popularity as HubSpot offers abilities for marketing, sales, CRM, and customer service.

It's easy to use. HubSpot is designed to be user friendly, despite how complex marketing automation can get. All technical terms are defined, you can even learn how to use the CRM system in the HubSpot Academy.

HubSpot has great customer service. You're by no means left alone with HubSpot – there's always a representative to give you a helping hand.

It can be free. HubSpot's CRM system can cost you a grand total of £0. Of course, there are different packages available that provide deeper insights and advanced tools.

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What CRM Systems Are Out There?

Large Building Product Business

For your large, enterprise building product business we recommend Salesforce.

Salesforce is a popular CRM system and it works to help you with marketing, sales, commerce, and customer service.

It offers customisation. With a wide range of widgets, your buildings products company can analyse performance with different perspectives to gain in-depth data.

It's quick to start without having to install the software so you can start your CRM system within a couple of days.

With these features, Salesforce will work well with your large building product business.





Conclusion

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A modern-day CRM system can effortlessly work to transform your sales and marketing so you're working to drive relationships and further increase sales.

Choose a CRM system with the features that are right for your building product business today and that can grow with you as your business evolves.

Picking the right system, implementing it, and enforcing best practices around its usage will pay off as your building product brand grows.

Thinking about implementing HubSpot as your CRM system?

Here at Insynth, we're HubSpot partners and have helped many building product companies successfully integrate HubSpot CRM, bringing them insights into their marketing and sales activities and boosting their growth plans.

If you need to talk about adopting or implementing a CRM system, or you want more information, get in touch with us, we are more than happy to help.



About Insynth

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We are Europes <u>first inbound marketing agency</u> to specialise in construction, driven to Deliver a predictable flow of leads, specifications and customers for your Building Product brand with a data-driven inbound marketing approach.

With 30 years experience in the construction industry, from specification, tendering through to delivery or even installation, we understand the challenges which hinder building product businesses when growing however, we have developed the right tools to deliver growth for building brands in this era of digital transformation.

Think of us as your outsourced in-house marketing team, working seamlessly with you to take control of strategy, implementation and delivery. From website design, search engine optimisation (SEO) and CRM implementation, to Sales & Marketing strategy, Insynth is ready to help you achieve your ultimate aim: Growing your business and getting new specifiers and customers.

eBook Author

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Ebook Written By Sandeep Bassi Digital Content Marketing Consultant

Sandeep is a creative and knowledgeable construction marketing consultant who has worked across the globe to help businesses achieve their marketing objectives.



Found This eBook Helpful?

Speak to an expert today about how your specific building product brand can implement HubSpot CRM.

Our growth experts specialise in construction inbound marketing and have extensive experience generating a predictable flow of specifications, leads, and customers for building product manufacturers.

Request a consultation by clicking the button below!





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