



Automated **ASK ABD:** Business Designs

What is CRM (Customer Relationship Management) and what does it mean relative to software utilization?

It all starts with you. CRM can mean different things to different organizations. It basically means **acting on opportunities to service customers**. It applies to marketing, engaging with a customer, closing sales, customer contact, and managing customer activity.

To effectively implement CRM using software, the system should be all encompassing. Marketing, service, sales and accounting need to be involved. In addition, management reporting and analysis tools are utilized to monitor if business goals are being met.

CRM is total customer management using resources that are built and available to system users. As information is gathered about prospects and customers, the ability to service increases. Tools that extract and report on this information are utilized regularly.

Logging activities, notes, follow-ups, order history, marketing contacts, correspondence, last contact, etc. are all part of the process.

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