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NetSuite CRM Tips & Tricks

NetSuite Customer Relationship Management (CRM)

CRM or Customer Relationship Management is a way to track your customer interactions in order to drive more sales and improve customer satisfaction. There is a lot of functionality in modern systems that allow you to keep track of this. Traditionally it has just been the basic customer contact and some business information of the customer and the business but now it includes social media, marketing newsletters, purchase history, accounts details and support. With all these tools at your disposal, it can be hard to figure out the correct way to use them for your business. This article will help you identify and think about areas of your CRM system that you might want to start using or change how you are already using to ensure you are maximising every sales opportunity, communicating and maintaining high levels of customer service.

It's Time to Get Smart
- Start to Maximise your NetSuite System
- Drive further Improvements into the Business
- No Limit to what can be achieved
- Head above the Clouds Now!

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Keep Customer Records Up To Date

Customer records are the most important part of the CRM solution. If you are trying to market or send information to a customer and their address or email is incorrect, the effectiveness of the tool is reduced. In NetSuite, you have the option to make fields mandatory, which will ensure that users complete all key fields. Address and contact information is the best place to start, however including information like product categories and territories will allow even better marketing capabilities.

Another way to keep your customers records up-to-date, is to create a Saved Search that sends reminders or emails when a customer record is incomplete. It may be difficult to obtain an email, phone number and address from a new lead. It's more effective to have a recurring email reminder that triggers an administrator to find the missing information and to have reminders about which customer records are missing information.
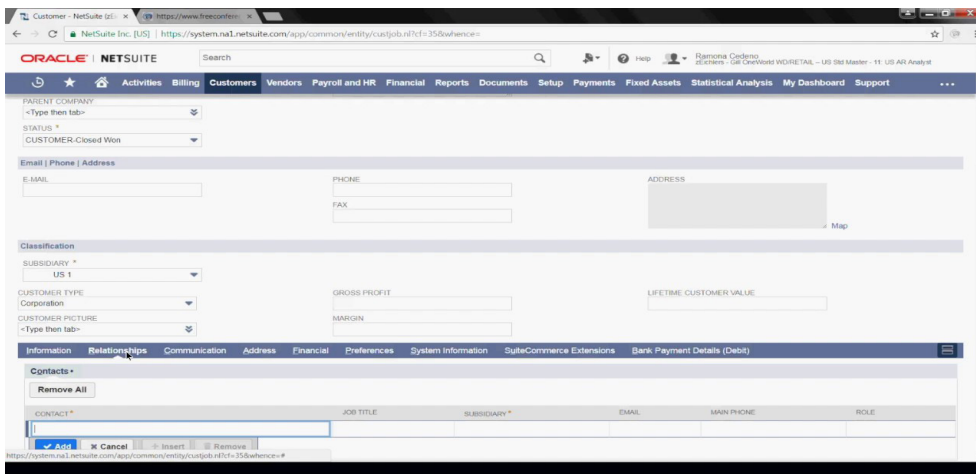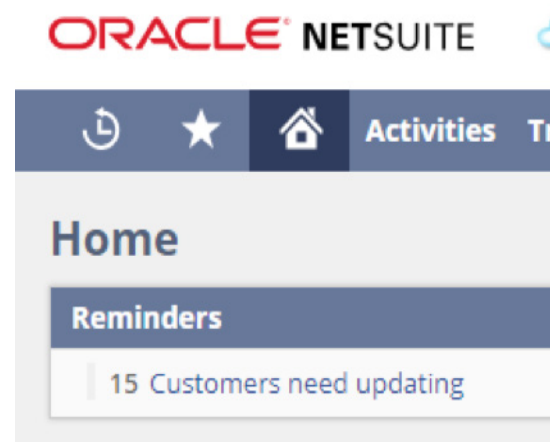
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Upsell Manager / Transaction History

NetSuite gives you the ability to upsell by generating ideas or product deals targeted at specific customers. Use upsell manager in the marketing menu to generate lists of upsell opportunities. Alternatively, use the customer record to look at items purchased. The system will generate a correlation by looking at how often two items are purchased by the same customer which means that you can target them with sales/marketing messages about that product. It makes your marketing meaningful and relevant to your customer

NetSuite also offers Lift functionality, which reports on how often customers buy which products from you. You can identify purchasing patterns and, for example, find out which months they are more likely to buy in and target them with special offers etc.

ITEMS PURCHASED	ITEMS TO UPSELL	▼ CORRELATION	COUNT
Mesh Chair	Urban Dining Table	85.47%	153
Mesh Chair	LIVING ROOM (Not For Sale)	80.45%	144
Extended Warranty - 6 Months	CARPETS/FLOORCOVERINGS (Not For Sale)	80.0%	4
Mesh Chair	Convertible Sofa	77.09%	138
FURNITURE HIRE (Not For Sale)	HOME/OFFICE DESIGN (Not For Sale)	68.75%	11
10 Office Chairs - 12 Months Hire	Sofa Repadding	66.67%	4
10 Office Chairs - 12 Months Hire	MAINTENANCE/REPAIRS (Not For Sale)	66.67%	4
Teak Dining Table	Kitchen Design	50.0%	5
Wooden floor repolishing	Regashi Bedroom Set	50.0%	1
Wooden floor repolishing	BEDROOM (Not For Sale)	50.0%	1

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Automation

Great customer service includes keeping them informed about their order status as well as other potential products they can purchase. Sending emails and reminders can be tedious if it's on a large scale. NetSuite can help automate these tasks by auto-sending information., NetSuite automatically sends emails informing Customers that their order is on its way, or that the order is ready for pickup. To extend this further, SuiteFlow can greatly enhance your business process by automating other communication to the customer. Workflows allow you to document a process and give conditions on when certain events should trigger. For example, after an item has been fulfilled, the system automatically sends an email following up with a request to review the product or a survey about the service that they received.

Another example could be when a lead is created or a customer is converted from a lead - SuiteFlow will send them the latest newsletter or latest promotion material.

Remember if you can articulate the rule, You can automate it!

Target Customers

Part of using an IT system is the ability to create custom fields on your records. When we are thinking of the customer space, being able to categorise our customers will mean we can target them all differently. Using the NetSuite platform allows you to define your own categories to effectively group your clients together. Do not limit yourself to just one type of category. You could classify customers as B2B, B2C or Wholesale. Another type of category could be the industry or types of products that you traditionally sell to them. You are able to create multiple marketing campaigns in NetSuite so having a different newsletter that goes to each category of Customer isn't very difficult to achieve. In addition, using Dynamic Groups based off Saved Searches supports adding Customers to the specific groups automatically thus tailoring the information they receive through the Marketing Campaign.

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Analysis

There is so much data in NetSuite, that once you have run your campaigns and successfully sold some goods or services, it is a good idea to step back and analyse the outcomes. It is great being able to send a newsletter to multiple people but was that campaign worth running? Does it give a good return on the initial cost of the campaign? You can look at marketing campaigns to see your click-through and open rates. Reporting will also show any sales information once leads have been captured. By analysing the results, you can prove that the campaigns worked or you can review them and make them better!

A great report for Marketing Analysis is the Campaign ROI Analysis Summary. Make sure you take the time to review the statistics available as standard in NetSuite.

CAMPAIGN	ID	COST	REVENUE	PROFIT	ROI	# LEADS	# PURCH
Newsletters							
Catalog Mailer			$1,334,303.95	$1,334,303.95	0.00%	12	
Distribution Monthly Mailer			$57,653.00	$57,653.00	0.00%	176	
November Newsletter			$17,276.00	$17,276.00	0.00%	9	
October Newsletter		$0.00	$434,054.34	$434,054.34	0.00%	87	
Still Interested			$0.00	$0.00	0.00%	1	
Total - Newsletters		$0.00	$1,843,287.29	$1,843,287.29	0.00%	285	
Newspaper/Magazine Advertisments							
San Francisco Chronicle		$0.00	$114,625.26	$114,625.26	0.00%	47	
Summer End Promotions		$0.00	$4,857.35	$4,857.35	0.00%	13	
Total - Newspaper/Magazine Advertisments		$0.00	$119,482.61	$119,482.61	0.00%	60	
Online							
August Special Offer		$1,500.00	$43,724.30	$42,224.30	2,814.95%	8	
Impressivo 1500 Special		$0.00	$45,554.88	$45,554.88	0.00%	19	
TIGO4U Social Campaign	SCTIGO4U1	$1,000.00	$200,167.74	$199,167.74	19,916.77%	4	
Social: Facebook							
Facebook: SuiteOffice	SCSS1	$1,000.00	$486,665.02	$485,665.02	48,566.50%	110	
Total - Social: Facebook		$1,000.00	$486,665.02	$485,665.02	48,566.50%	110	
Total - Online		$3,500.00	$776,111.94	$772,611.94	22,074.63%	141	
Paid Keywords							
Keyword-Yahoo Marketing / Overture-Office supplies		$4,500.00	$289,613.27	$285,113.27	6,335.85%	58	
PPC-Google office furniture		$5,000.00	$677,642.41	$672,642.41	13,452.85%	32	

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Capture more leads

A great way to capture leads is to put an online form on your website. With NetSuite, you can do this quickly and easily, and any information captured will create a lead automatically in your system. This can be setup to also notify the salesperson responsible for that customer or area. The salesperson can then follow up or send through information and introduce themselves. NetSuite will tag the leads that have been generated from online forms with a lead source.

USE OUR ENQUIRY FORM
And we will get back to you as soon as possible.

First Name *

Last Name *

Email *

Phone *

Company

Role

City

Message

If you haven't allocated a salesperson to a customer, you can set up Sales Rules and also Round Robin rules to ensure all leads are passed to a salesperson automatically. If the customer has given you their information, you don't want to lose the opportunity to engage simply because the lead is sitting awaiting manual allocation to a team member.

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Provide Support

NetSuite comes with Customer Service and Support as a standard feature. Customer Service is very important for customer satisfaction and can greatly increase your credibility and referrals. Once support is enabled, you can provide customers with an email address where they can contact you to raise a support case. This can be directed to your Support Administrators to manage the case. Emails to and from the customer are automatically captured within the case along with documents and notes. With the cases being captured, you can then manage them by priority, create alerts to your employees and report how effective your business is at supporting your customers.

The Customer Centre also allows customers to raise cases online and these can be assigned based on the defined rules. You can also extend further with a Knowledge Base should your customers need a Self-Service facility for Known Questions etc.

Remember great customer service is appreciated by all customers and they are then happy to refer your company to other potential customers!

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Pre-populated emails

As managers and owners of a company it is important that all outbound communication gives the correct message and looks professional. NetSuite has the capability to create mail merge tags within email templates. You can create pre-populated emails with generic responses, such as notifying a customer if a product is out of stock or if an order has a delayed delivery.

Another use of pre-populated emails is when marketing generates marketing collateral used for sales. Instead of having to put pressure on the salesperson to create their own campaigns, you can generate templates from NetSuite which can be shared. Once the campaigns have been created the sales rep can select from a range of promotional material and then use their judgement to send it to a group of their customers. As with Marketing Campaigns, NetSuite captures statistics against your Sales Campaigns.

The CRM features of NetSuite help ensure that every interaction that your customers and prospects have with your company is a positive one. Your challenge is to decide what is important to your business and more importantly, what will work for your customers. Customers like being kept up to date but be careful not to overload them or send them information that isn't relevant. A careful approach along with a good knowledge of your NetSuite system will allow you to stand out from your competitors.

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