



# Introduction to CRM

## DO YOU NEED A SOPHISTICATED CUSTOMER RECORD MANAGEMENT SYSTEM IN ORDER TO DELIVER GOOD SERVICE?



You've got to record, annotate, note down everything about your customers in order to make them feel special ..... Haven't you?

Just how sophisticated do your records have to be?

What exactly do you need to capture and how? Is this going to cost me more to keep the information than I'm making from my services?

*“ Be it furniture, clothes, or health care, many industries today are marketing nothing more than commodities - no more, no less. What will make the difference in the long run is the care and feeding of the customers. ”*  
Michael and Timothy Mescon

### **What is a Customer Record Management System (CRM)?**

A CRM is any system that you use to keep information on your clients or customers. Some people have elaborate computerised systems, other simply keep a sheet of paper on each person that they have dealings with. However you choose to record your information there are some key pieces of information that you need for each client or potential client you have.

### **WHAT INFORMATION SHOULD I RECORD?**

The main things that you need are those that allow you to contact your client or potential client and key information that help you build your relationship with them.

- **Contact Information**

Legal Name, how they prefer to be addressed, telephone numbers (land-line and mobile), mailing address, availability times and dates, any special requirements.

You also need to record when you have agreed for coaching sessions to be – yes, you will have this in your diary but a list of agreed sessions with each client should also be kept – it allows you to copy it and send to the client if they ask.

Also, when dealing with a potential client, get in habit of keeping this information and annotating when you called and what was discussed along with any actions. You may put 'rang but not available' or 'asked if I knew anything about xxxx?', or 'said ring back beginning of xxx'. This allows you to track your conversations and know what to do next.

If any client asks you to ring back then diary it and annotate their record as well. Do the same with any written information you send out – mark what and when you sent and also what you expect the

- Customer Record Management Systems (CRM) are they worth it?
- What do I want to know about my customers and what do I want to remember?
- Pencil and paper verses computerized systems

client to do with it once they receive it – you can also put a copy of what you sent into their record.

- **Business Relationship Information**

What areas they are focusing on for their coaching, who are their support network, key names they use and their relationship to your client, agreed plan from each session with notes against it of outcomes achieved, priorities of concern, order these are to be dealt with etc – anything to do with your actual coaching.

You may also include copies of the 'wheel of life' if you use this, lists of priorities they have made in sessions, brief transcripts of each session you have completed – anything that you can use to track progress made and more importantly, areas that are being consistently avoided by the client.

Another useful record to include in this area are lists of words that your client uses to describe themselves, especially important if they consistently put themselves down as you can use this as evidence of their own verbal issues and try to educate them talk more positively.

- **The Extras**

Birthday dates of you client and key people in their life, personal likes and dislikes, health issues, working status, marital status, key life events that are happening etc.

The first two lists are things you need to have a working relationship with your client however, what makes that relationship into a fantastic one is when you remember key things about them that you are able to use to build better rapport and trust. Simply knowing when your client's birthday is and sending them a card shows that you take an interest in them – so note this date down. Knowing also what their children's names are and ages help as well. You are able to anticipate key mile stones in your client's life by simply knowing their child is about to start school – you are better prepared and they feel more confidence in you.

It is possible to run a coaching session where you have no knowledge of the issue that the person wants coaching on or any personal information. Simply by following the standard coaching practice you can help them, however and this is the big but ... by building a relationship with your client you will increase their trust in you. Trust allows people to share some of their BHAGs – Big Hairy Audacious Goals with you and go for the things that they have always wanted to address. Not everyone wants to deal with their BHAGs but for those that do, having a great relationship with their coach is essential.

Think of it this way, would you tell all of your hopes and dreams to someone you just met on the bus or would you prefer to confide in your big sister or brother. Feed back to coaches is that they are often seen as that older sibling – the one who has been out in the world and made the mistakes so won't judge them when they do wrong but more importantly, wants them to try because not trying is worse than failing.

### **Paper or Electronic**

A simple file with dividers in it may be all you need for your first few clients. Other people keep access databases or excel spreadsheets on contacts with a slim file of written details of the sessions to complement it. How you keep your records is up to you. However, there are two things to remember.

1. If you computerise your work – back up your files on a regular basis
2. Keep a paper contact list of number. It is extremely embarrassing to say to a client 'I couldn't call you – my pc crashed and I'd no idea of your number'

### **Useful Forms for Keeping Information**

Coachville has an online selection of forms in PDF format that may be of use at:

<http://www.coachville.com/cvmembers/cforms/> Note that these forms are copyrighted.

Some of the forms are better than others but they are an excellent resource when you are starting out and for more experienced coaches, great place when you need a little boost with a client. We particularly like the '*bringing out the best in me*' form to remind our clients in the dark hours of the great things they have achieved.

### **You and the Data Protection Act**

A rule of thumb is that if you state to your clients or potential clients that you will only keep records whilst you have a business relationship with them you will probably be exempt from needing to notify the Information Commissioner.

Business Link has clear guidance on how to work within the Data Protection Act on their website: <http://bit.ly/karmafriends-dataprotection>



If you are interested in joining Karma Friends then email [bowmanassociates@aol.com](mailto:bowmanassociates@aol.com)

This is a sample of the work we do for Karma Friends.  
You can learn more about our coaching at:  
[www.bowmancoaching.co.uk](http://www.bowmancoaching.co.uk)