

[illegible]

Introduction

Globally, organisations have experienced unprecedented disruption caused by the coronavirus pandemic since 2020. For those organisations without the resilience to adapt and work in different ways, the journey has been significantly difficult. The crucial lesson we have learned is that we can no longer delay the transformation in the way we do work.

Since the pandemic disruption, workplaces have never been more remote or disparate, yet resilient organisations have found progressive new ways to embrace flexible team working in ways that would never have been thought practicable before 2020. They have also moved to redefine roles to align with rapidly changing customer needs sometimes redeploying staff into completely new activities.

Many 'Future of Work' initiatives have had to be accelerated to bring forward and prioritise more



progressive approaches to managing work, the workforce and our workplaces. The surest way to create true resilience, whilst also deriving the greatest value from the workforce, is to create an environment that provides the opportunity, the tools and the motivation for people to thrive.

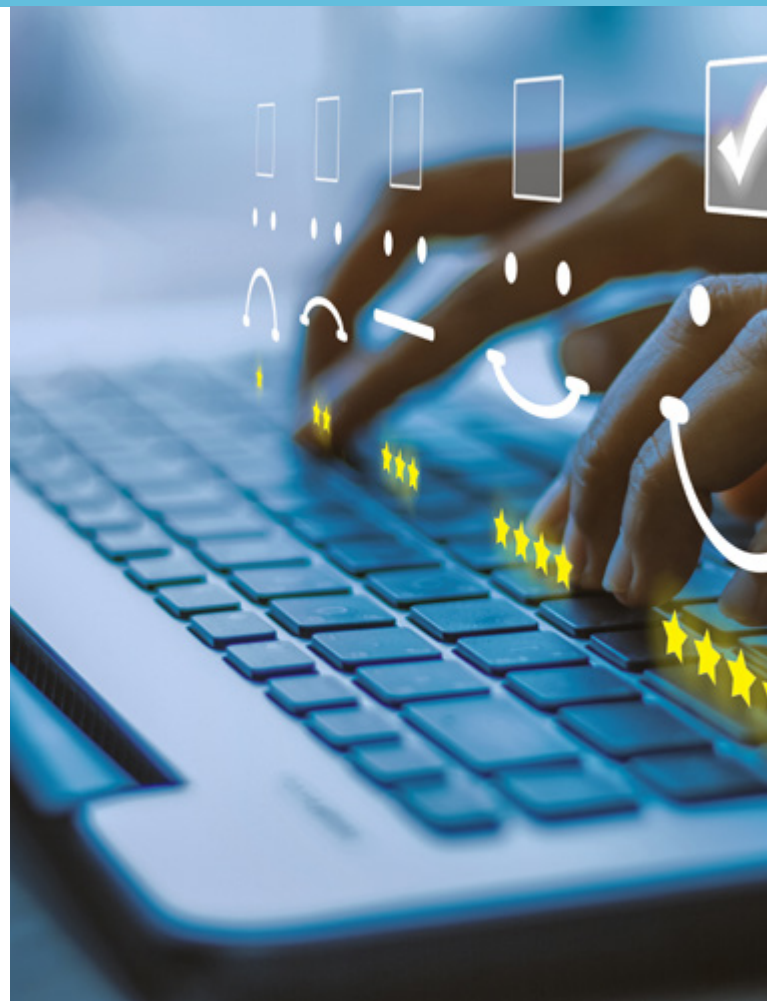
In this whitepaper we'll discuss how a good CRM solution and implementation can support organisations' transformation efforts now and into the future.

Adapting to New Customer Behaviours

In our previous whitepaper '[The Evolution of the Customer – How Technology, Collaboration and Behaviours are Changing the Landscape](#)', we outlined the recent and accelerating shifts taking place in both business to consumer (B2C) and business to business (B2B) marketplaces as well as wholesale markets and within supply chains. In this whitepaper we ask the question: *How can the modern workforce adapt to new customer mindsets and behaviours?*

Business to Business

B2B companies often undergo complex sales cycles. Their clients are often businesses that have their own complicated needs and processes and are seeking products or services that can be expensive and highly customised. This tends to result in longer sales cycles, greater attention to customer service, and interactions with multiple decision-makers and stakeholders.





Modern B2B customers tend to do a large amount of research on their own, and they are usually more informed about your product or service when they speak to one of your salespeople for the first time. This introduces a new set of challenges for your sales team because every call or email to any potential customer needs to be personalised to their specific needs.

In addition, revenue generation is no longer a matter for salespeople. All departments are now concerned with improving margins, from customer service advisors to marketers and product teams to name just a few functional areas. All of an organisation's touchpoints, through their activity, can have an impact on the bottom line **and** customer experience:

- The marketing team in producing content to address customer issues and accelerate progress through the sales funnel.
- Retention teams, whose whole purpose is aimed at limiting customer churn as much as possible and maximising revenue through cross-selling and upselling.
- Product teams seeking to design products with a great user experience that generates positive online reviews as well as proactive word of mouth.

Sales strategies are no longer driven solely by the objective of customer acquisition. A real driver of growth is now retention. Revenue growth comes from selling more to existing customers rather than from gaining new ones in many cases.

As retention has become an important issue, sales processes are becoming more complex. The traditional methods of collecting leads, moving them through the pipeline, waiting for them to convert has become too simplistic. Sales processes have become more cyclical. They will require repeated, multi-layer and multichannel interactions with customers.

They will take place over months or even over years after the first sale. The performance of sales strategies will be measured less by the data generated (lead scores, conversion rates, volume of deals) than by the quality of the experience generated. This will require salespeople to have a broader skill set and a deeper understanding of customers. Being good on the phone and good at selling will no longer be enough.

A CRM solution for the modern workforce makes it possible to give a single view of customers and prospects to all the teams that need it. Integration technologies will multiply, making it possible to integrate all customer data and a wider range of functions into the CRM. CRMs will become more interactive. Reporting capabilities will become richer.



Business to Consumer

Most B2C categories globally have seen more than 10 percent growth in their online customer base during the pandemic according to McKinsey, and many consumers say they plan to continue shopping online despite bricks-and-mortar stores reopening. In markets that have had moderate online conversion rates before the pandemic, e-commerce continues to grow across all product categories.

In addition to e-commerce, other digital and contactless services—including home pickup, delivery, and drive-through services—are also seeing much higher adoption rates. While some of these habits are seen as a work-around to the pandemic, many at-home solutions to regular activities will likely be adopted for the long term.

New consumer behaviours span all areas of life, from how we work to how we shop and to how we entertain ourselves. These rapid shifts have important implications for B2C companies. Many of the longer-term changes in consumer behaviour are still in flux, giving companies an opportunity to help shape the new normal.

Modern customer engagement has become multichannel, with a majority of mid-level and enterprise brands selling and marketing across numerous channels. Communication strategies built on key channels like email and SMS have been supplemented by push notifications, social media messengers as well as the next generation of on-site and in-app messaging tools.

Whilst the commercial impact of this is positive, it has created a challenge around identifying customers as they move between channels during the buying cycle. An initial product search may begin on mobile, for example, leading the customer to your mobile website.

The actual purchase, however, may be made on a desktop device. And of course, there is potentially any number of steps in between like engagement social media posts, a query submitted to your online support team and so on.

In order to achieve the coveted single view of the customer, which consolidates all of these events in one place you need an integrated CRM solution.

Gaining a complete, individual view of customers and prospects is key, and that means that your data should not be in silos or lack data from social media or other channels.

A key benefit of a good CRM solution is the ability to profile customers or leads to determine what they might purchase, their lifetime value and much more. The more data you have on your customers and prospects, the easier it is to create a more complete profile.

By integrating your website and back-office systems with your CRM, you will get a fuller, more complete picture of your customer's interactions with your organisation, from initial enquiry to sales, product, service and communication preferences all the way through to payment history and reviews. It gives you access to more reliable and consistent information. You are better informed about your customers and you've better visibility of your customer's behaviour and buying habits.

Customer profiling goes a long way toward determining your marketing campaigns success. Whether you are targeting business or consumer prospects, to be able to effectively communicate with them, you need to understand who they are.

A Move to Hybrid Working

There seems to be little doubt that the future of work will be more hybrid. Prior to the coronavirus pandemic, the majority of organisations required employees to spend most of their time on-site. However, as the pandemic eases, executives say that the hybrid model—in which employees work both remotely and in the office—will become far more common. According to McKinsey's recent [article](#) on hybrid working, the majority of executives expect that (for all roles that aren't essential to perform on-site) employees will be on-site between 21 and 80 percent of the time, or one to four days per week.





Obviously not all industries or occupations offer the same opportunities for remote work or even hybrid work. Agriculture, construction, transportation, and hospitality are the most obvious industries where many jobs are impossible to make a shift to hybrid working. Conversely, financial services and professional services have demonstrated ample ability to switch to remote and then hybrid models.

Many organisations have recognised how productive employees can be at home with the correct technology, and many are now looking into a permanent shift to flexible working. This new model of hybrid working, which is a combination of remote and office based, leaves employees open to flexibility when it comes to working practices. The key for this is to provide employees with the correct technology enabling them to perform their role anywhere any time.

Central to transformation is the adoption of technology that will support and engage employees as they are the individuals at the heart of the modern workplace. Having access to the relevant technology will enable users to deliver enhanced services and experiences from generic daily tasks to key business operational decisions. By adopting a digital-first business approach and using technology as an enabler, employees are able to reach their full potential whilst contributing towards improving their overall output and productivity.

Collaboration across departments is essential to aligning the new culture and is crucial to the successful implementation of digital transformation for any organisation. That said, the human element is key for all levels in the stages of transformation such

as the success of collaboration, ecosystems, skills, culture and empowerment. Since people don't want digital in every sense of their life and value human and face-to-face interactions, there will always be an 'offline' element of the transition.

Collaboration

How employees communicate internally and externally has changed dramatically over the past 2 years with reduced face to face meetings or they may have even come to a stop altogether. Online meetings have become normal and, even in sales positions; video conferences have widely replaced in-person meetings with customers, colleagues, and managers. This obviously has efficiencies in not requiring travel, but hinges on communication tools that support collaboration and enable easy and high-quality audio and video calls.

Moving towards a hybrid model requires expanding the use of these tools and an underlying collaborative culture, independent from the physical location of workers. The opportunity is to work seamlessly in teams across multiple locations and potentially time zones, obtaining contributions from collaborators once difficult to be reached e.g. those in factories or partners' offices. The challenge is to move these opportunities for communication & collaboration beyond knowledge workers into the wider workforce.

This is where an integrated CRM solution can come into its own, allowing teams to share information proactively using workflows and document storage at a one to one level or across multiple stakeholders in real time.



Automation

Although work automation has been around for decades, the pandemic has cast it into renewed focus. Organisations have redoubled their attempts at integrating and building end-to-end automation environments for productivity and to ensure resilience.

The focus now is moving from the automation of repetitive, administrative and low-expertise tasks and processes, to the integration of real intelligence for automation technology that executes more sophisticated tasks and workflows. Data is the fuel to make it work, and leveraging technology and data to extend businesses with additional services is, therefore, the key to generating new revenue streams.

Agility and Flexibility

Flexible working is important to an organisation's resilience: hybrid and alternative working models will become a means to attract and retain talents. As employees' expectations change – propelled further by the pandemic – most leaders expect flexible work policies to remain, at least in part, in the future, allowing for a higher degree of freedom for employees in terms of mobile working, flexible hours and part-time work.

The pandemic has proven that a flexible workforce can help companies rapidly adapt to changing business realities. However, this strategy also bears the risk of losing talent due to a lack of loyalty or connection to the company.

Because ViewPointCRM is tailored to your organisation's processes and integrated with your other critical systems, you have the peace of mind to know that StyleTech can react to your needs quickly to ensure that process changes or changes to your organisation structure can be acted upon quickly to reflect your changing needs. StyleTech have decades of experience in building bespoke software solutions that can flex with organisations as they flex and grow.



Reporting and Measurement

Many organisations may be concerned about moving to a hybrid model on a long-term basis, perhaps fearing a lack of oversight will lead to gaps in processes and a downturn in productivity. Fortunately, the past year has proven the willingness of the wider workforce to seize the opportunity to make working from home a success. With some people home-working and some out of other locations, you need to place more trust in their ability to self-manage and work to a high standard. Increasing trust and reducing micro-management is key to making a hybrid approach work for the team.

CRM reporting contain valuable insights designed to improve internal processes, manage performance and facilitate data-driven decisions. Different departments and roles within an organisation can take real-time information and generate custom reports.



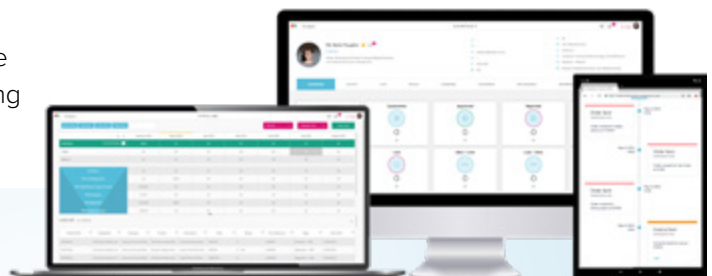
Final Thoughts

Many organisations are aware of the gap between the ideal and current state of customer experience, as well as the lost value for both the customer and the organisation. With a modern workforce, and the more informed type of buyers, it has never been more important that organisations help to close the gap by providing leadership for CRM activities that support relevant and valued customer interactions. When customer touchpoints deliver a consistent and excellent experience while addressing customer needs, everyone wins.

Not only do employees benefit from the hybrid work model, but organisations can too. Experiences from lockdown show that there are a number of key enablers for a successful hybrid work model including trust in your people, regular communication and good digital tools. There is no doubt that digital technologies are reshaping the future of the employee and customer experience. Organisations need to foster digital literacy and the skills of their employees, and not least in maximising the benefits of their CRM solution.

Working from home is not new, nor are hybrid working solutions, but the ability to make these solutions and practices work more efficiently, is now accessible to more organisations through streamlined systems and improved communications tools. No longer does working from home mean the need to update your records when you visit the office, because advanced CRM systems, particularly cloud-based ones, provide a normal working environment wherever remote workers are working from. Making use of CRM technology is essential if companies are going to meet the competitive demands of businesses and consumers in the new normal.

To find out how ViewPointCRM can help your organisation, [click here to arrange an initial meeting with our team.](#)



During this 1 hour demo, our team will walk you through the key modules within ViewPoint CRM from company and contact management, managing sales pipelines and quotations through to reporting and workflows.

[Click Here to Register Your Interest.](#)



About StyleTech

We Are All About You

At StyleTech we are committed to building a deep understanding of your organisation, its strategic goals and challenges. Equipped with this knowledge we work with you to deliver a fit-for-purpose CRM solution that will help drive your organisation forward.

Why our clients choose us:

- **Trust**
We are trusted by leading private and public sector organisations across the UK.
- **Security**
We keep our clients' systems protected and secure at all times.
- **Award-winning**
We have won multiple awards by applying best practice to the areas of analysis, design and software development.
- **Specialists**
Our expert team of developers have decades of experience in developing software across current and legacy platforms, ensuring seamless integration of applications.



Joshua Chapman
Marketing Director
Scientific Laboratory Supplies

"We chose StyleTech because their system was unlike anything else we had seen. Not only did their functionality tick more boxes than many other systems with functionality like the Quotes Hub and Discovery, but their programme allowed for significant bespoke interfacing to other areas of our business that would have required cost-prohibitive development from other packages we were looking at. This would allow for a much more consolidated programme with opportunity for further development as we continue to develop and innovate our systems."



StyleTech Solutions Ltd.

3 Iridium Court, Owen Avenue
Priory Park West, Hessle, HU13 9PF
01482 325779
hello@viewpointcrm.com
www.viewpointcrm.com

StyleTech Solutions Ltd.

Kemp House, 152-160 City Road
London, EC1V 2NX
020 3887 4626
[@viewpointcrm](https://twitter.com/viewpointcrm)
[linkedin.com/company/viewpointcrm/](https://www.linkedin.com/company/viewpointcrm/)

