New NetSuite CRM Add-On: Uniting CRM Users Through Personalized Experiences

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Every business needs to find, acquire and retain customers. At emerging companies, the same person might conduct all the sales, marketing and service tasks associated with this goal. However, as the business grows, functions that a small number of individuals could previously handle soon require entire teams to manage. That leads to challenges around communication, information visibility and response times — problems that are often exacerbated as data silos pop up around the company.

NetSuite was designed to provide a single home for all the data a business needs to operate. Many companies start with ERP to manage their financials, for example, and soon discover the benefits of bringing their sales, marketing and customer service activities into NetSuite.

Zeroing in on managing customer relationships, organizations that depend on NetSuite CRM to streamline their sales force automation, marketing automation and customer service management processes may also want even more visibility into sales forecasts, campaign metrics and escalated issues. That's why NetSuite now offers expanded CRM capabilities for customers via a new **CRM Add-On** that provides roles and dashboards specifically tailored to sales managers, sales representatives and marketing and customer service teams, along with prebuilt **SuiteAnalytics Workbooks** to help measure sales performance.

Let's look at why such insights are so critical to growth, and how to get them.

The CRM Balancing Act

As they expand, many businesses address the needs of their sales, marketing and service departments one by one, ending up with different software solutions for different teams. What often follows is a frustrating, expensive and extended struggle to reconcile and integrate the data held in these disparate systems.

In the meantime, poor visibility into sales performance, marketing results and customer satisfaction can stunt growth and lead to costly mistakes.

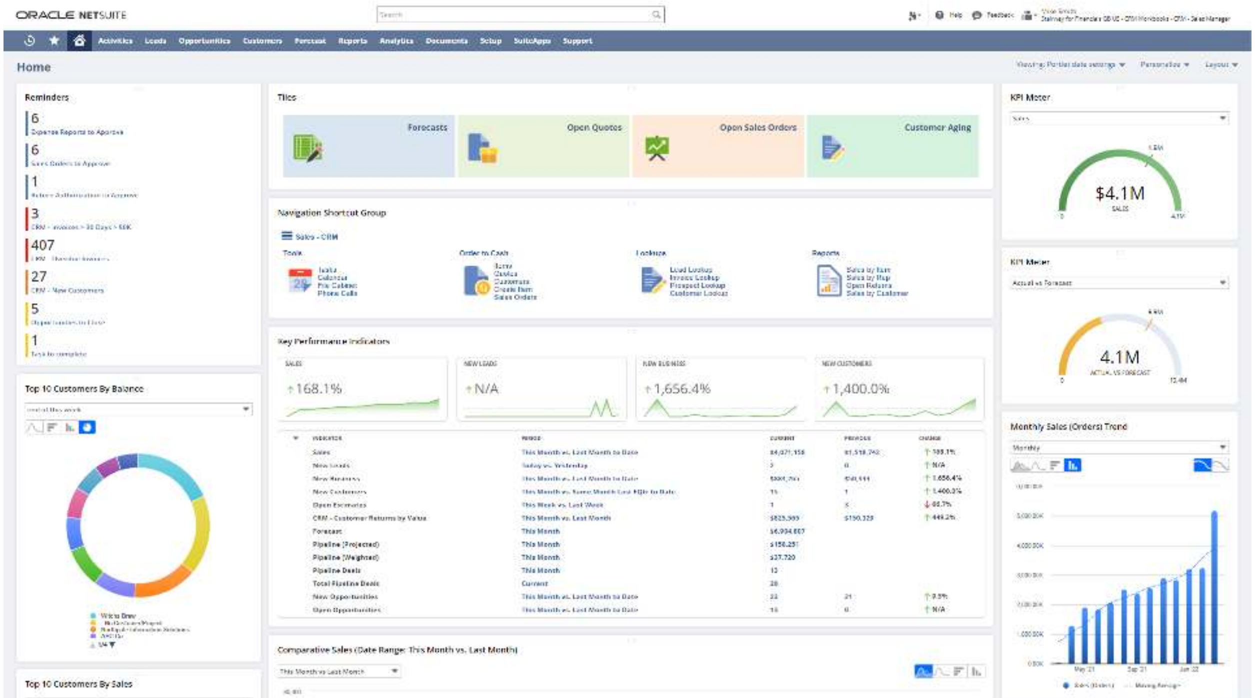
Unfortunately, the opposite approach — a single system — can also have unforeseen consequences. What appears to be a simple, one-size-fits-all tool intended for use across teams often turns out to be a poor fit for just about everyone. Inadequate functionality and lack of flexibility lead to anemic uptake and eventually a failed implementation.

When it comes to CRM, striking the right balance between personalized user experiences and cross-team connectedness can mean the difference between a slow, uphill battle and rapid business growth. With such high stakes, it’s worthwhile to understand and consider your users’ unique needs when choosing solutions for marketing, sales and customer support.

Shared Vision, Different Views: What Sales Needs

Your CRM platform should be your sales team’s home base, a central source of intel that can be relied on for prospecting, forecasting, quota tracking and managing renewals and upsells.

CRM users aren’t all interested in the same thing, however. Sales reps want to focus on immediate tasks, like whom to call next, which prospects they’re meeting with today and which deals in their pipelines need attention. Their primary goal is to meet or exceed their quotas.



New sales manager dashboard.

Sales managers share the same vision as their sales reps: Close deals and make money. Their role in achieving that vision, however, requires an aerial view of what's happening on the ground. They want to make sure their reps have the support and resources they need to get deals across the finish line, so they need to identify when to provide feedback, assistance or additional training.

They also want to make sure that marketing is consistently filling their teams' pipelines with qualified leads so that reps have plenty to keep them busy. And, managers need to report back to executive leadership on sales performance but don't want to spend lots of time hunting for data and building reports, so they need an easy, repeatable method for providing an accurate forecast.

Plugged In & Personalized: What Marketing Needs

Marketing teams need a CRM that can serve their needs, too. Often, marketing lists and campaign reports are siloed away from sales data in a completely separate system, making it hard to give credit where credit is due. When sales achievements cannot be attributed back to specific marketing campaigns, not only do marketing managers struggle to prove ROI, but they also can't fine-tune future campaigns to optimize results.

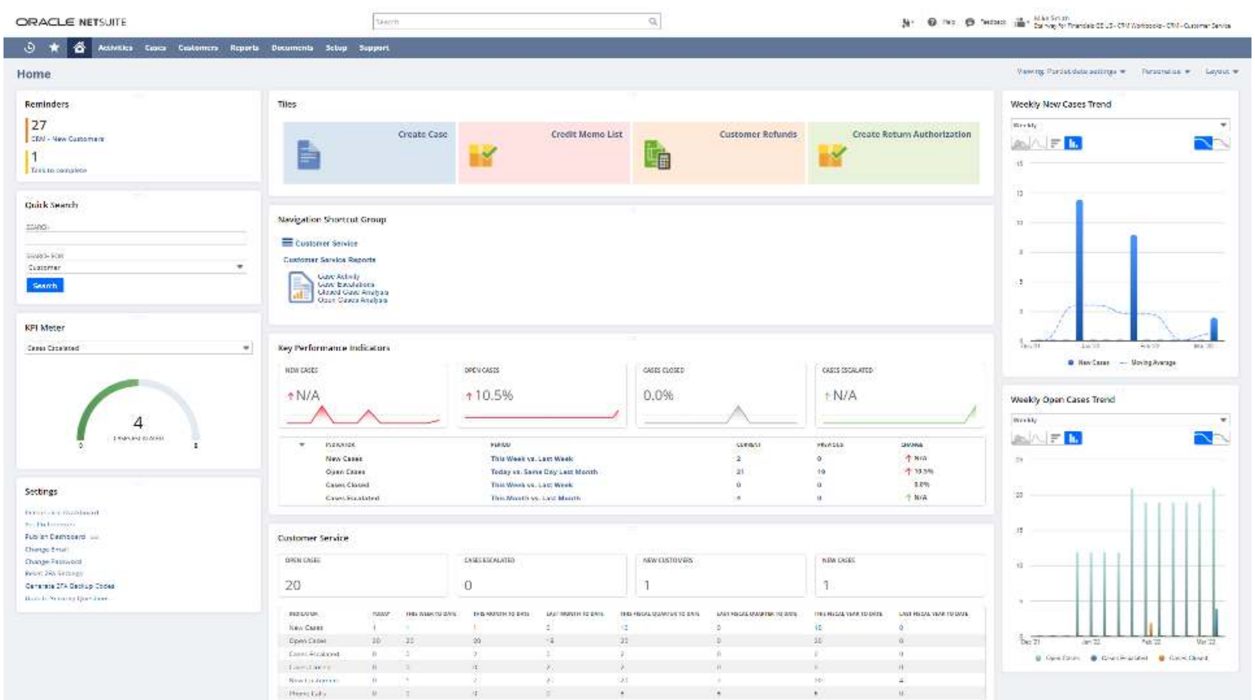
Automating multichannel marketing campaigns to align them with sales efforts begins with having a single source for lead, prospect and customer data so that campaigns can be segmented and tailored to have the biggest impact.

Once a campaign is launched, teams can track marketing qualified leads (MQLs) and sales qualified leads (SQLs) through the sales funnel. That provides insight into which campaigns produced the highest-quality leads — and ultimately the most revenue.

It's the Little Things … AND the Big Picture: What Customer Support Needs

Customers calling your service center usually have a very specific question or experience to share. Whatever the particulars of the situation, the customer expects your representative to have answers and solutions at the ready.

To provide satisfactory resolutions in a timely manner, customer service reps need access to a wide range of information, including customer details, past orders, payment history, product catalogs and inventory. Without access to the same CRM data that your sales, warehouse and finance teams see, service agents will struggle to find and deliver accurate and helpful answers to potentially disgruntled customers.



New customer service rep dashboard.

Not only do service reps need easy access to real-time customer data, but they also need a system that distributes and escalates support cases efficiently. While some businesses manually assign support cases, reviewing them individually before deciding who will handle each, this method slows down the time to first response, leaving the customer waiting in the queue longer than necessary and possibly allowing the problem to grow in the meantime. When escalations are necessary, automatically assigning the case to the next best person without delay can mean the difference between winning a fan for life and losing future sales.

Clearly, companies need rich, timely and complete data that's accessible across the business.

Extending NetSuite CRM

NetSuite CRM is built on the NetSuite ERP platform, which means that NetSuite's sales force automation, customer service management and marketing automation are natively unified with order and inventory management, commerce and financials. That integration provides businesses with real-time insights into sales forecasting, marketing lead generation and customer satisfaction data.

Now, the new **CRM Add-On** delivers for customers that want even more robust CRM capabilities.

The recently released Add-On includes new CRM roles and dashboards for sales reps, sales managers, marketing and customer service, putting the unique needs of *all* your CRM users front and center and giving those users easy access to their most-used NetSuite capabilities.

The CRM Add-On also includes a new **CRM Workbooks SuiteApp** featuring 10 prebuilt SuiteAnalytics Workbooks focused on sales performance KPIs. Building your own reports from scratch can be time-consuming and error prone, so this SuiteApp is designed to take both the grunt work and the guesswork out of sales reporting.

The CRM Workbooks included in the Add-On allow you to seamlessly adopt CRM reporting best practices and access crucial sales performance metrics, such as opportunity forecasts, quotes to sales conversions and won-versus-lost opportunities.

The CRM Add-On provides businesses with built-in sales force automation, marketing automation and customer service management leading practices, so all of your CRM users are equipped with the right tools and the right data at the right moment for their unique roles and responsibilities.

The CRM Add-On SuiteApp is now available on the SuiteApp Marketplace. Watch the on-demand Suite Fundamentals product demo webinar to learn more about NetSuite CRM and see the CRM Add-On in action.

Discover How NetSuite 2022 Release 2 Can Help You

These are just some of the notable features in this release. For more information on the full list of features and how to use them, be sure to check out the release notes.