

Streamlined for Success

RFMS' CRM platform promotes transparency & workflow efficiency

By Mallory Cruise-McGrath

[Tuscaloosa, Ala.] RFMS is uniquely positioned to address the industry's growing need for a tool that manages the entire sales process as well as its move to mobile technology. In fact, the company developed a CRM (customer relationship management) solution that is integrated with RFMS' core software and provides a mobile solution that enables every sales associate to be more effective and increase sales.

Managing leads and supporting customers from the initial interest to the installation is part of the platform's success. Rod Bayless, director of sales and marketing at RFMS, shared that, on the whole, 50 percent of CRM platforms introduced to the market fail because it's often seen by the sales associate as additional work. RFMS' new CRM app was designed to change all that.

"Sales associates have to collect data while keeping up with client relationships and then have to input all this information into a CRM platform, and they just see it as more work," he explained. "Our CRM was developed to integrate seamlessly with their daily workflow, capturing all those client relationships, whether that lead is walking into the store or from the website. It all starts in the primary RFMS portal and works its way through the showroom to the customer's home to measurement and is housed in the app."

Don Roberts, president and CEO of Don's Carpet One and Wheat's Carpet One, both operations located in Alabama, said RFMS' CRM app is seamlessly integrated with the company's core platforms, essentially eliminating the need for outside programs like

QuickBooks or even sticky notes.

"Sales associates can move information back and forth in the same system instead of having to re-input that information into different programs which significantly cuts down on cost and workload. Everything can happen in the new CRM app," Roberts noted.

COMPREHENSIVE COMMUNICATION

The lifecycle of each sales opportunity is managed through the CRM pipeline, providing clear visibility as well as a means to organize every step of the sales process and communicate with the customer.

"Through the app, we can send notifications, update schedules and follow-up with customers to offer them a better understanding of where they are in the sales process," said Fred Kotynski, RFMS CIO. "Without that communication, it's up to chance customers will be notified properly."

Jason O'Krent, director of sales at San Antonio-based O'Krent Floors, an RFMS customer since 1983, said this centralized communication will prove to be particularly beneficial. "[Communication] is the most important, yet difficult to manage, aspect of the sales cycle, especially when so many team members are involved in a project," he said.

The communication also extends throughout the business, including among sales professionals and estimators. Kurt Wilson, apps product manager for RFMS, explained, "Previously, a salesperson would have to communicate different types of information to an estimator, such as the customer's address, product to be installed,

"USING RFMS' CRM APP AND HAVING A HIGH-LEVEL OVERVIEW OF WHAT A SALES STAFF IS WORKING ON – AND HOW THEY'RE WORKING ON IT – IS GOING TO BE HUGELY BENEFICIAL FOR ANY BUSINESS IN TERMS OF EVALUATING WHERE THEY STAND AND WHAT THEY'RE DOING TO GROW."

— RT BAYLES, FOUR SEASONS FLOORING

rooms to be drawn, etc., through email, text or verbally. But with CRM, all of that information is right at the estimator's fingertips."

The app's web portal feature also enables a salesperson to send a quote and chat with a customer in real time. "We text the customer a web link that remains live throughout the entire sales process," Wilson said. "A sales pro can then share a link to the products a customer was interested in, move to floor plans and measurements and then progress to a mature quote." There's also an option for a customer to provide their digital signature indicating if a quote is approved.

RT Bayles, owner of Myrtle Beach, S.C.-based Four Seasons Flooring, has been an RFMS customer for more than a decade and said the CRM app will prove invaluable when managing his sales associates' workflows.

"Using a CRM platform will consolidate the way our salespeople do business, making it more consistent across all sales associates, and will help them track customers better, follow up and close sales," he said. "It will allow me to better manage each person's workload which is a huge benefit."

And without the means to organize leads and communicate with customers effectively, a retailer's sales process can be crippled, offered Kotynski. This is where RFMS' CRM app comes in. "CRM will take your sales team to the next level and provide you with measurable performance metrics that may be invisible to you today," he said.

For more information on RFMS' CRM app, visit www.rfms.com/CRM.



CUSTOMER RELATIONSHIP MANAGEMENT APP



Manage your sales workflow on the go!

RFMS CRM provides an easy to use app for your sales team to gather leads and communicate with customers from initial opportunity to close, all from the convenience of your tablet or mobile device.



CRM Meets All of Your Sales Team Needs:

- Mobility
- Efficiency
- Workflow
- Integration
- Communication
- Scheduling
- Reporting

Integrated and Easy to Use



Pipeline



Realtime Reporting



Instant Communications



Customer Web Portal



Company-wide Calendar



Mobile



Measure & RFMS Integration



Customer Profile

TARGETED BENEFITS & UNIQUE FEATURES

[Tuscaloosa, Ala.] RFMS' new CRM app includes the key benefits today's retail sales associates need to manage their workflow on the go along with additional benefits not found in competitive CRM software. Here is an overview of the app's core features:

- Contact Management
- Internal and Customer Interaction Tracking
- Pipeline Management
- Workflow Automation
- Scheduling and Calendar with Tasks and Appointments
- Notifications – internal and customer
- Document Management
- Reporting/analytics

Unique features that distinguish the RFMS CRM from others include:

- Tight integration with the RFMS mobile apps and core system
- Robust two-way communications with email and text messaging
- A customer web portal that provides critical product, quote and order status information that allows for customer approval or acceptance and other communication