Investing time in your Bankcard Pros CRM ensures you gain the most from it.

By Robert Hendrix

The Bankcard Pros CRM Team is passionate about our company and proud of our accomplishments with our products and services. Together we have dedicated nearly a decade creating and building Bankcard Pros CRM Software. We care about our customers and spend a large part of each day developing our CRM product, whether adding new features or improving existing ones. Our CRM remains a never-ending project for us. Our team wants Bankcard Pros CRM software to help customers be as successful as possible, yet we know all too well the age-old expression, “You can lead a horse to water, but you cannot make it drink!”

With that in mind, we are truly proud of our software, with all its potential and capabilities. But we need our customers to come along for ride, to invest the necessary time and resource, to utilize the software correctly in order to maximize its efficiency for the business.

We understand that for many businesses it’s not always a short, simple, straight-forward task to set-up and configure the CRM, and we know you need support. Indeed, we’ll admit that some customers have in the past objected to what they see as a lack of support, feeling as though they are not getting the most from their CRM.

In these instances, the Bankcard Pros CRM Team poses two questions:

First, “Has our customer been able to meet their expectations of the software by investing sufficient resource into it?”

And secondly, “How can the Bankcard Pros Team best assist the customer?”

Naturally, we investigate every customer query to find out the root cause of an issue. Typically and somewhat disappointingly, we often discover one of three things. First, some customers are still yet to log into the software. Secondly, the required Set-up and Configuration Checklist has not been completed which is a requirement, and finally much time has passed between the customer perceiving an issue and eventually notifying the Bankcard Pros CRM Team.

We hope that each of our customers will invest the appropriate time to complete the required set-up and configuration checklist, read all support materials, and ensure they view all training videos. After all, a CRM purchase is a solid financial outlay and as such requires the customer to dedicate time and resource to make sure the product operates as efficiently as possible.

Support from our team shouldn’t need to commence the moment after installation; instead we hope it begins after the customer has completed the checklist, read all set-up materials and viewed all the training videos.

Sometimes customers choose not to follow instructions. We understand the pressures of time and multiple work commitments. But we advise against taking short cuts and skipping steps that are essential in making the CRM experience a positive and beneficial one for the company. The checklist has been carefully developed to facilitate the customer’s initial exposure to the CRM product, to transfer knowledge and ensure the customer can work independently, and in a more effective and efficient manner than by over-the-phone support.

We believe any CRM project needs to have a dedicated staff member who will take responsibility for the software. This ensures the company's CRM implementation is achieved in a straightforward and hassle-free manner. As with the introduction of any major business decision, CRM implementation is a project requiring careful planning. A well-managed CRM project ensures that possible issues are perceived and resolved, and that a customer understands well in advance the capabilities and limitations of the software.

Recently, one prospective customer wishing to buy our CRM software made the following comment:

> "Let's face it, we are all looking for the perfect CRM that does what each of us want it to do, and which is different for each ISO/MLS. We want it cheap, we want "up-to-the-second" response in service, we want our name on it and so on. Come to think of it… I just sounded like the majority of my merchants."

With all CRM software, a company must be prepared to invest substantially, to pay more for support, and to prepare its staff to devote a portion of the daily routine and resource using the CRM for their business. It's advisable to include this in the company's budget and accept this part of the ongoing operations expenditure. If a company chooses to invest adequately and budgets wisely to pay support fees, then they will always receive a favourable outcome. The dilemma comes when companies insist on superior support and endless hours of assistance free of charge. Any company with a successful CRM implementation will have done its homework carefully and allocated sufficient financial and human resource to the project - and that on an ongoing basis.

Extensive and comprehensive online training is available 24 hours a day, so why bother with over-the-phone support? We currently have 64 high-quality training videos available online, all day, every day, and we believe the training covers each and every aspect of the CRM. Online training is accessible and convenient and doesn't require time-consuming note-taking. Simply upload, sit back and watch - and of course the training videos can be viewed as frequently as needed!

What we are asking for is this: the customer needs to invest a reasonable amount of time to learn, set-up, and use the software. They can complete 80-90% of this in their own time and without the need for extra assistance. Obviously, we will help customers and walk them through the remaining few items they don't understand. The more time and effort the customer invests in the software, the better they will understand the software capabilities and the greater their understanding of its potential to realize their expectations.

So what about the question: "But this is why we are paying for support!" Our company sells software just like any other, and the support our customers pay for consists of answering questions and teaching clients how to do things when they are stuck. But we believe the customer also has a responsibility to set-up, use, and manage their own CRM on a daily basis. We have had customers in the past demand that we make changes in their CRM because they pay for this support, when this is not the case. The biggest dilemma is a majority of the customers haven't appropriated enough time to read thoroughly and understand the contract agreement, watched the videos, set-up and configuration guide, checklist or the question and answer guide. We need you to do this in order that your CRM experience is an enjoyable one, and it's a requirement we've clearly enunciated in the contract agreement.

But let me be clear – we do offer support to get the customer though the tougher moments! We are available to answer questions and guide customers through simple tasks. However, we do not operate the CRM software, complete the set-up or carry out configuration checklist. For legal reasons, we are prohibited from making changes, adding, editing, or deleting anything in your CRM after the customer starts using the product.

We have customers that employ young staff in sales offices, who use the CRM daily without being trained and requiring almost no external support. This is because they put the effort into using the software. As in many businesses, some customers forget to invest time and resource in CRM as they feel too many time constraints dealing with new sales, training agents, and supporting their own merchants. This is a no-win situation. Customers are aware that they they require a CRM for their sales office, yet they feel they don't have the time to start using it.

For this reason, we mention in the first 3-4 pages of the Set-up and Configuration Guide that it is highly recommended that the owner assign a manager or employee to manage this CRM for the office. Owners do not have time trying to do all this on their own yet still need to learn the capabilities of the CRM and use as frequently as possible.

Recently we had a customer tell us on the phone that he "was expecting the Bankcard Pros CRM software to be live and ready to use as soon as it was installed" and that he "didn't have time to do the set-up." So what should the customer expect from the Bankcard Pros CRM Team?

In this case the customer switched over to Bankcard Pros CRM from Microsoft CRM software, the latter was a vast, complicated system including thousands of features, many of which will remain unused. Such a system demands an enormous cost when needed for hundreds of users, and consumes a tremendous amount of resources to learn and operate the system. The process with our company is the same, but certainly less complicated.

Due diligence is part of major business decision and our customers should know what they are getting when they purchase our CRM. Our system is built specifically for the bankcard industry so we avoided adding an overabundance of features. Our product has the features required for any sales office selling merchant services and credit card processing equipment/software, and we omitted introducing features that would never be used. Some customers report that they can use only 30% of our CRM software; this is why Bankcard Pros CRM offers the option to disable features that won't be used.

If a customer chooses not to participate in reading the support documentation, learning how to set-up the CRM, watching the training videos, and completing the set-up and configuration of the CRM software, a project can rarely meet the customer's expectations. We understand that customers will not be able to learn 100% of the CRM software in a week but we believe the customer can learn and set-up 60-80% of the CRM independently. We will be able to guide you to learn and set-up the remaining steps.

The Bankcard Pros CRM Team knows it can be frustrating to set-up and implement the running of new software, but we hope the customer will avoid making statements like these:

> "We do not have time to do this."
> "We don't have time to read anything."
> "We expected this CRM to be up and running when you first installed it."
> "This is what we pay you to do."
> "We never received support so we could never even use the CRM software."

When our staff receives emails like this, we first do research to see what was completed with their CRM, such as “How many times did they login”, “Was the checklist started or completed”, ”Did they add all their users in the system”, “Did they build a document download library”, “Did they import their existing clients”, “Did they edit the email notifications”, “Did they customize the status levels and user type levels” and so on. Nevertheless, from time to time we still have customers who have avoided undertaking the most basics steps to get started.

Here is an example of how much time it would take a customer to get started:

Print out the 28-page Question and Answer Guide
Print out the 41-page Set-up and Configuration Guide
Print out the 13-page Set-up and Configuration Checklist.

It takes about four hours to read the documentation and another two or three to complete the Set-up and Configuration Checklist. We also highly recommend that customers watch all 64 YouTube training videos, a total of approximately five hours’ viewing. In all, in about two or three days a customer can achieve everything that is required. To obtain best results, it depends on just closing the door, eliminating all distractions, and completing the tasks!

When all this is done, the Bankcard Pros CRM Team can help customers import clients, contacts, and other tasks which should only take another hour. If the customer follows our instructions above and does this right the first time, it will prevent having to redo things manually in the future, eliminating confusion and avoiding wasted time and money.

We’re in the software business and we know CRM inside out. Each day CRM software becomes more and more sophisticated and able to handle a myriad of complicated tasks that save businesses time and money. However, like any large investment, we hope customers will take ownership of the investment – time and effort will ensure the CRM becomes a great tool for the customer’s business.

Nurture the software early on so that later it will thrive. It’s that simple. With effort from the customer, together with the Bankcard Pros CRM Team, we know the CRM will be a positive business experience. We know the typical customer can install and use 80% of the Bankcard Pros CRM software without assistance from us. We’re here to provide the additional support required when issues arrive further down the line.

In the end, CRM software belongs to the customer and can only be as successful as the time a customer dedicates to it. An investment of time and effort will result in the success or failure of utilizing CRM software. If the customer manages this well, such an investment will save the company thousands of dollars in time and money because it will organize employees and allow the sales office to board, manage, and deploy even more merchants on a daily basis. With a small investment of time in set-up and training, the Bankcard Pros CRM experience is certain to be a positive one.

For any questions, please contact the Bankcard Pros CRM Team at (800) 985-9157 or email us at <u>training@bankcardpros.com</u>