

 WHITE CUP

# CRM Buyers Guide for Distributors

**Making the decision to invest in a CRM**, or any software for that matter, is a major investment that takes time, resources, and money. There's no shortage of CRM solutions on the market, with capabilities ranging from just the basics to every bell and whistle imaginable.

For years, distributors have tried to make do with CRMs designed for any industry, shoe-horning their specific needs into generic solutions. The result: underwhelming software and frustrated users. The exact opposite of your original goal.

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**Let's get started ...**

## **Section 1:**

# What's a CRM, and why do I need one?

## What's a CRM?

At its most basic level, Customer Relationship Management (CRM) software is a tool used to manage customer relationship information effectively. The purpose of the CRM is to make it easier for sales to drive revenue through new accounts and grow sales with existing customers.

Different CRMs offer various levels of complexity and cost. The key is to find the CRM with the right set of features that best align with your business goals and budget. When the right CRM is put to work for a team, it becomes an invaluable backbone to the revenue engine of a company. It drives the sales cycle and eliminates busywork, allowing sales teams to do what they do best: sell more.

A CRM gives businesses the central location for all customer data while tracking of all customer interactions. CRM benefits can include sales automation, reporting, and analytics; forecasting, quote, and order management; customer service and support; marketing automation; e-commerce; customer tracking; and partner relationship management, and mobile access.



## What a CRM isn't.

The CRM is not the same as your enterprise resource planning (ERP) software. While the ERP houses customer data, it doesn't provide the tactical, action-oriented data of a CRM. An ERP's strength lies in drawing from a unified data source to improve efficiency of business operations and automate processes. This data spans across finance, inventory management, procurement, human resources, and other critical organizational functions. The CRM solution drives customer acquisition and retention and helps increase sales. This system synchronizes interaction data between sales, marketing, and customer support teams.

Just as a CRM system cannot perform the functions of an ERP system, an ERP system cannot and should not replace an effective CRM solution. Trying to 'double-dip' with your ERP as a CRM is simply ineffective.

## Adoption: Why it's critical.

Change can be challenging for anyone, including adopting a new way of working or using new software. No matter how cool the technology is, almost every software implementation project is met with a healthy dose of skepticism. Why? Because nearly everyone has been part of an implementation that failed to deliver. Whether it was an old CRM, a billing system, or even the latest Windows upgrade, there are always challenges to overcome.

However, what's most important to keep in mind is that you are adding this solution for a reason. Adoption is critical not because it's just nice to have the latest and greatest, but because every new adoption is precipitated by a need. Before anything was purchased or decided on, there existed a struggle on your team that led you to search for a solution. Adopting your new software is exactly how you address those needs, how you learn, and how you gain efficiencies.

That's why it's vitally important to have clear goals, early buy-in, and, most of all, and a clear adoption plan before, during, and after the actual implementation.

### Before

Round up the right stakeholders, get them engaged and excited. They will be the influencers that set the tone of adoption for the rest of the company.

### During

Communicate progress early and often. It's not a major change; it's a better way of working more efficiently that will drive sales for the entire company.

### After

Keep encouraging the team to use the tool. Spotlight team members who are making the most of the CRM. Have informal learning sessions where the early adopters share their personal wins using the CRM.

## Why do distributors need a CRM?

The CRM organizes mountains of information into easily digestible charts and reports that allow sales teams to prioritize their daily outreach while allowing sales managers to see how a team is performing. Additionally, the insights from the CRM can help reps have more meaningful and customized conversations, including cross- and upsell opportunities. In short, a CRM helps drive top and bottom-line revenue using customer data.

Distributors who work without a CRM have often done so by sheer hustle and have learned habits based on a “we’ve always done it that way” mentality. The sales team may have several different processes cultivated by individuals to suit their work styles. Storing customer information and communication in multiple locations that don’t sync creates a confusing sales process, and not all team members can see the same data. In this environment, accurate forecasting, tracking sales funnel activity, and reporting can be difficult, frustrating, and time-consuming. All of which is time spent NOT selling products and growing the business. Sound familiar? You’re not alone.

## Why is it so hard for distributors to find a CRM that works?

For years, distributors have tried to make do with CRMs designed for any industry, compromising and adapting their specific needs into generic solutions. The result: underwhelming software and frustrated users. Distributors have unique sales processes that are different than other industries. Additionally, as software end-users, distributors need solutions that are easy and demonstrate the value of that solution, or they will revert to old ways. The “what’s in it for me” mentality from end-users is genuine, and entirely reasonable. It’s human nature.

Often, the addition of technology is seen as just another tool. Another thing to learn. Another change. When introducing the idea of a CRM into a distributor’s business, think of it as a shift in mindset, not just a reporting tool. It’s about creating better, more meaningful relationships with customers while making it easier for salespeople to succeed.

3 Signs It’s Time for a Distributor CRM 

## Get off on the right foot with your CRM search by keeping these three steps in mind:

### 1. Set clear objectives from the start:

Discuss the sales process with the team, including leadership, managers, and sales reps. CRMs can do a lot, but maybe your team doesn’t need every bell and whistle available right out of the gate. Determine which KPIs are most important for your team to track.

### 2. Identify your organization’s pain points:

Once you understand why you need a CRM (or a new CRM), take a hard look at your sales and marketing processes. Identify shortcomings with an eye toward improvement. Is there a lack of automation? No pipeline management? Is the system not purpose-built for your industry? While no CRM will address or fix every struggle, identifying weak points and focusing on fixing the process with realistic expectations and defined success is an excellent start.

### 3. Remember that you’re searching for change:

Be open to adjusting your workflows and approaching solutions from a new angle. Change is difficult to swallow, not just with a new CRM. However, searching for a new CRM means that something isn’t currently working. If you want to replicate what you’re already doing, it would be cheaper and faster to stay the course. But if you want to refine, learn, or grow, you need to change.

## Relationships and Hustle: Two things that will never leave the industry

It is important to keep in mind that while the industry is embracing a digital transformation, the relationship part of CRM will never go away. Building and fostering customer relationships will always be driven by human connection. The CRM makes that relationship-building process more efficient and mutually beneficial. Additionally, to the ultimate salespeople, who are always “on” and always hustling to sell more and crush quotes, the CRM is there to help you hustle smarter, sell more, and drive faster.

**For more on how relationships and sales acumen benefit from the right CRM solution, watch our webinar ...**

Putting the ‘Relationship’ Back in CRM: 5 Ways CRM will help grow your revenue”

 Watch

## **Section 2:**

# Asking the right questions

Once you have a list of clear objectives you want from your CRM and an equally clear list of challenges your specific business faces that you'd like to conquer, it's time to consider options. There's no shortage of CRM providers. A quick Google search shows more than 1,600 CRM providers across various industries with an equally broad set of features and price points. The best way to find the solution that fits is to consider the providers who understand you best. A CRM solution built specifically for distributors.

## 10 Questions to ask when considering a CRM:

Selecting the right CRM for your company will require more than ten questions, but here are critical questions to ensure you're not getting a cookie-cutter solution that won't grow with your business.

1. Do you understand the distribution industry and our challenges?
2. Does the solution offer distribution-specific functionality?
3. Will I need a third-party consultant to integrate with my ERP?
4. Does the solution meet my team's specific, defined challenges?
5. What is the provider's process for training and adoption?
6. Is there role-specific data?
7. Is the solution scalable?
8. Does it integrate with my other sales tools? (e.g., business intelligence)
9. Is there functionality to align marketing and sales efforts?
10. What are its limitations? Where does the CRM stop in the buyer's journey? (e.g., quoting, signature management)

| Feature                                   | Generic CRM | ERP Built-In CRM | White Cup CRM |
|---|-------------|------------------|---------------|
| Prebuilt distribution ERP integration     | No          | Yes              | Yes           |
| Mobile anywhere                           | Maybe       | No               | Yes           |
| Workflow automation                       | No          | No               | Yes           |
| Email integration                         | Yes         | No               | Yes           |
| Pipeline management                       | Yes         | Yes              | Yes           |
| Bill to-Ship to functionality             | No          | No               | Yes           |
| Quoting                                   | No          | No               | Yes           |
| Cross-team collaboration                  | Maybe       | No               | Yes           |
| eSignature                                | No          | No               | Yes           |
| Marketing automation                      | No          | No               | Yes           |
| Dynamic lists                             | No          | No               | Yes           |
| Revenue intelligence platform integration | No          | No               | Yes           |



## **Section 3:**

# **I need a CRM. Now what?**



# About White Cup

White Cup is a revenue intelligence platform designed specifically for the distribution industry. Our CRM, BI, and Pricing software is the complete revenue engine for distributors, laser-focused on driving more and better revenue:

- Our software gives distributors the upper hand at every revenue touchpoint, from prospecting to closing sales deals to retaining customers and selling more to existing customers

## The White Cup Revenue Intelligence solutions include:

### White Cup CRM:

Our CRM offers a comprehensive set of distribution-focused features to drive sales, automate marketing activities and keep deals moving to close.

### MITS BI by White Cup:

This powerful business intelligence solution marries ERP and sales data into dashboards and reports that uncover customer insights, buyer trends, and visibility into your sales process.

### White Cup Pricing:

An analytical powerhouse that improves both top-line revenue and bottom-line profit. With White Cup Pricing, complex customer and product segmentation and pricing analysis that used to take weeks now take minutes.



**White Cup Revenue Intelligence Platform:**  
**Your Engine for Driving Revenue**

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